

Patient Tracker™ 5.1 Manual

Last Edited: April 17, 2001

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I. Introduction

Patient Tracker™ is a handheld-based charting application for Windows CE and Palm OS devices. It is designed to be a tool that help the medical professional keep track of important information about their patients. Handheldmed is developing additional tools for Patient Tracker™ in order to process many of the medical professional's daily tasks, including: dictation, procedure logging, billing/coding, and prescription writing. Using Patient Tracker™ will streamline healthcare processes, and improve documentation, saving both the physician and patient money and time.

II. System Requirements

A. Windows CE

- 1. Windows CE or Windows Powered Device running OS version 2.0 or higher.**
- 2. Base Installation requires 350k-700k of memory dependent on device type, with additional memory required depending on the number of patients and the size of their records.**
- 3. Printing requires that the handheld device has an IrDA port, as well as access to an IrDA compatible printer.**

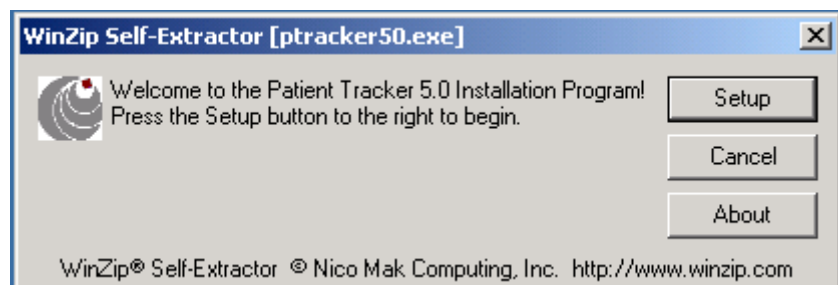
B. Palm OS

- 1. Palm OS or compatible device running OS version 2.0 or higher.**
- 2. Base Installation requires 160k of memory, with additional memory required depending on the number of patients, and the size of their records.**
- 3. Printing requires that the handheld device has an IrDA port, as well as access to an IrDA compatible printer.**

III. Installation

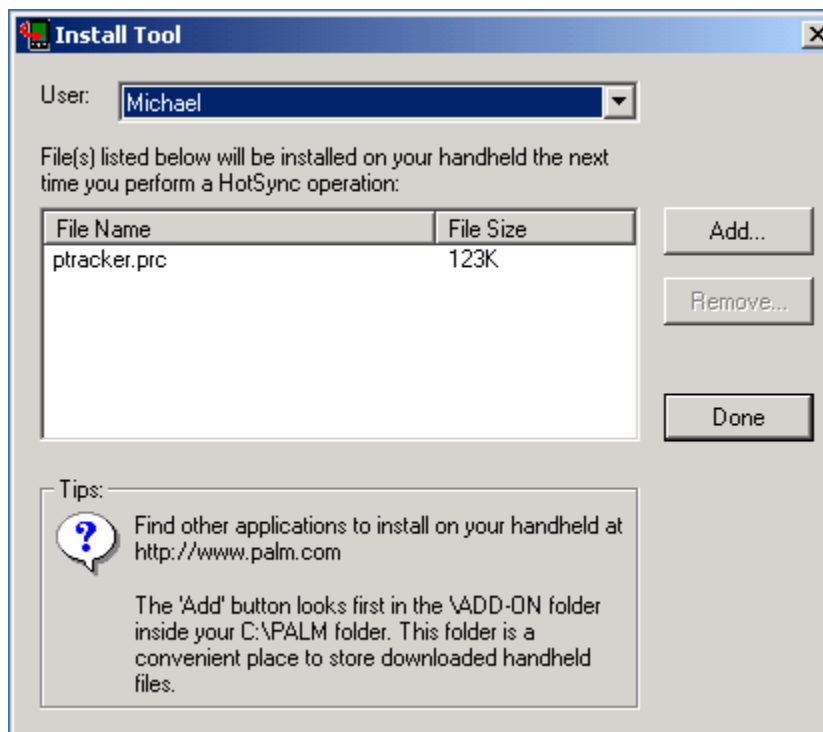
A. Windows CE

1. To install Patient Tracker™ from the desktop, locate the file (ptracker50.exe) that you downloaded from the Handheldmed web site.
2. Make sure that your Windows CE device is connected to the desktop computer that you are installing from.
3. Double click the file PatientTracker.exe on your desktop.
4. Follow all on screen instructions.



B. Palm OS

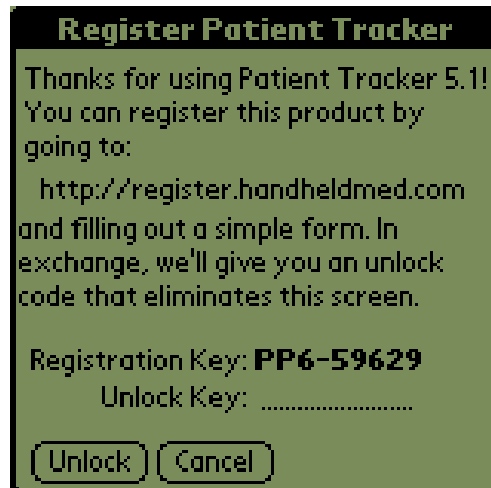
1. To install Patient Tracker™ from the desktop, locate the file that you previously downloaded (Ptracker.prc).
2. Make sure your Palm OS device is connected to the desktop computer that you are installing from.
3. Double click the file Ptracker.prc on your desktop, which will launch the Palm OS install manager.



4. Click Done.
5. Hotsync your Palm.

IV. Registering Patient Tracker™

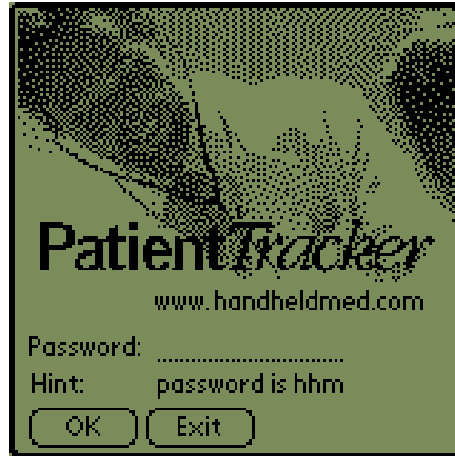
A. Registration Screen



1. Open a browser on your desktop computer, and go to the page <http://register.handheldmed.com> .
2. If you are not already a registered member of Handheldmed.com, please follow the instructions on your desktop browser screen to do so now.
3. Enter the registration key found on YOUR palm device as shown in the example above into the blank on <http://register.handheldmed.com> , and press the get unlock key button.
4. Enter the resulting unlock key into your palm device in the Unlock Key blank as shown in the example above.
5. Press the Unlock button.

V. Using Patient Tracker™

A. Login Screen

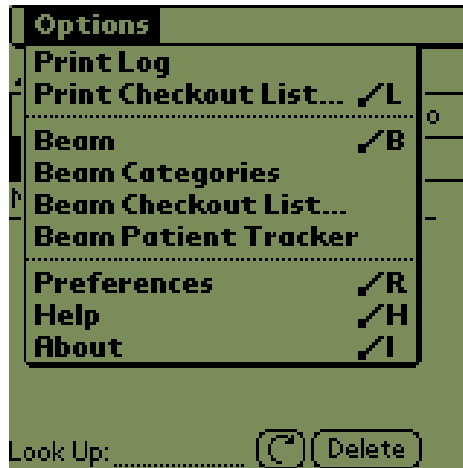


1. Logging In

- a) The default password is “hhm”, with the default hint set to “password is hhm”.
- b) Enter your password in the password blank and then press enter.
- c) Lost or forgotten passwords cannot be replaced in order to protect patient data. Please choose passwords and hints carefully to avoid this.

2. Changing your Password Preferences

- a) Select Preferences from the menu.

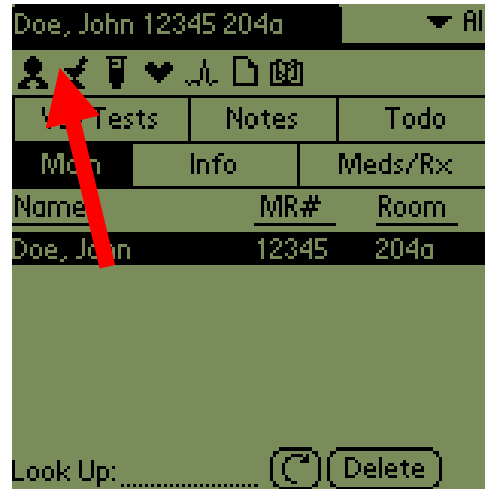
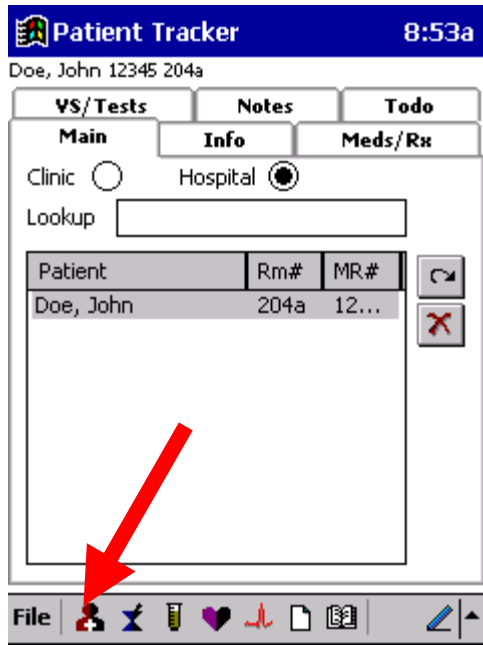


- b) The security tab allows you to change the period of inactivity before the application is locked, and additionally change the hint for the password.
- c) Pressing the Change Password button allows you to change your password. **CAUTION: Passwords cannot be recovered if changed and forgotten in order to keep patient data secure.**

B. Patient

1. Adding a Patient

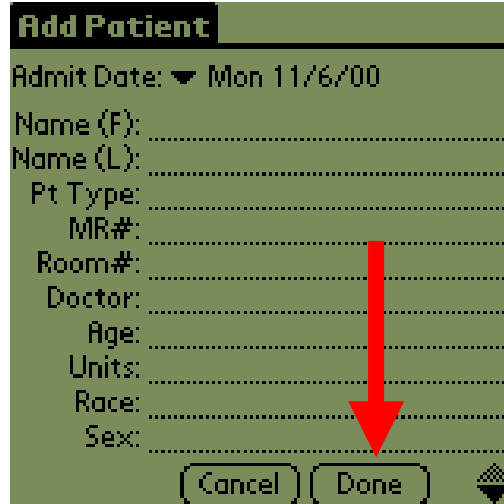
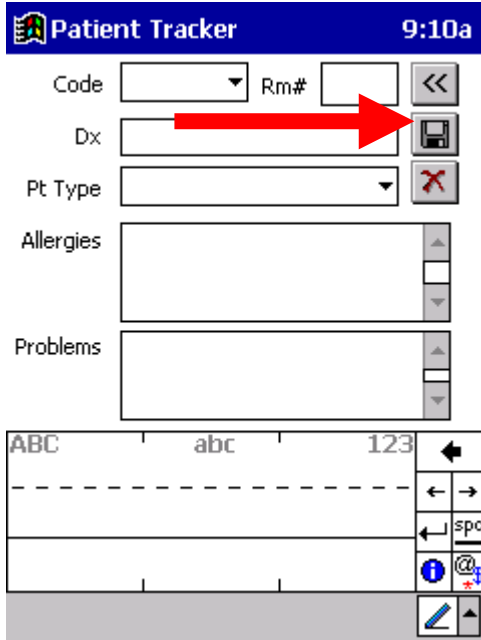
- a) From the main Patient Tracker™ screen, press the Add Patient button.



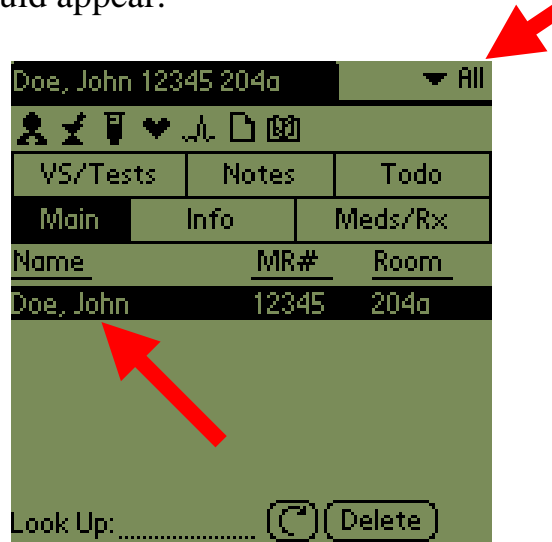
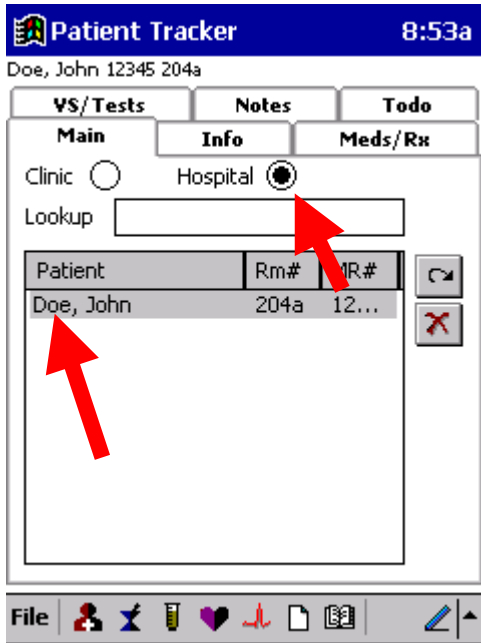
b) Complete the patient demographic information on screen 1, and then press the Next Screen Button (CE version only). **First and Last Names are required.**

The screenshot shows the 'Patient Tracker' application interface. At the top, there is a blue header bar with the text 'Patient Tracker' and the time '9:09a'. Below the header, there are several input fields: 'Name (F)' with a red arrow pointing to a '>>' button, 'Name (L)' with a red 'X' button, 'MR#' and 'Dr' text boxes, 'Age' text box and 'Age Units' dropdown, 'Race' and 'Sex' dropdowns, and 'Date' set to '11/ 7 /00'. At the bottom of the screen, there is a keyboard overlay with a numeric keypad and function keys like back, forward, space, and a blue arrow key.

c) Complete the patient demographic information on screen 2(CE Only), then press the save record button. **The Patient Type is required.** On the Palm, tap the individual word to pull up a list of preloaded values. (ie. Tapping on Sex brings up a choice of Male or Female). This feature helps to speed information entry.

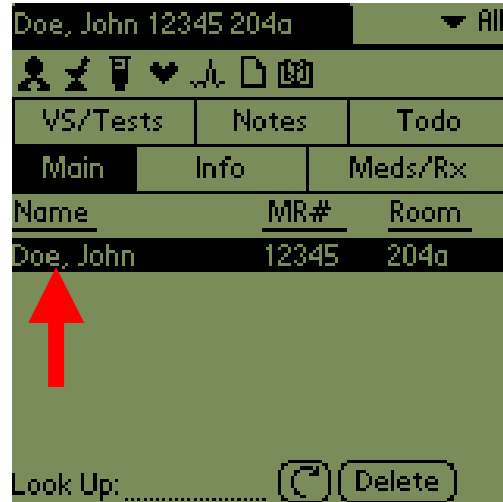
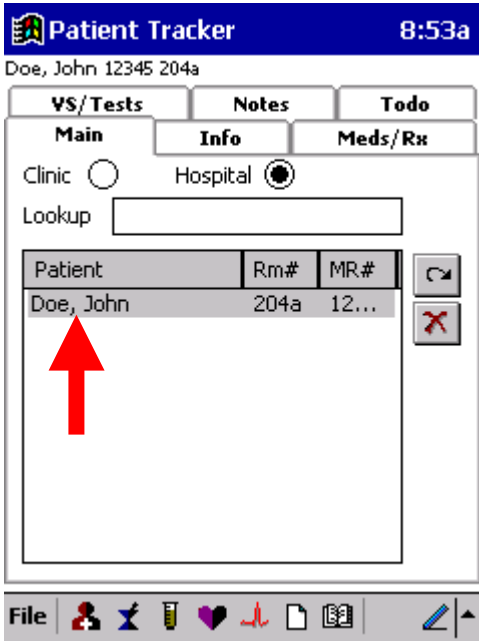


d) Make sure the patient list location is set to match the Patient Type (Hospital or Clinic) you entered in Step c, and your patient should appear.

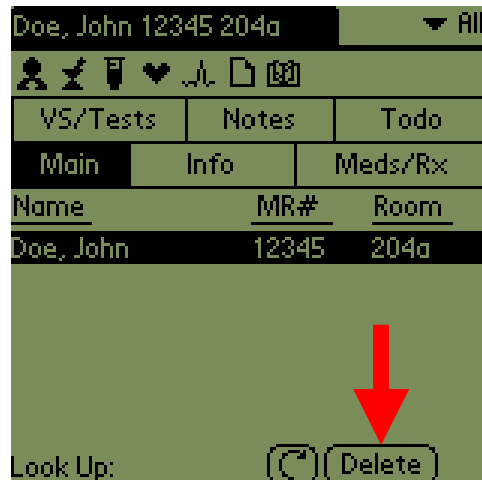
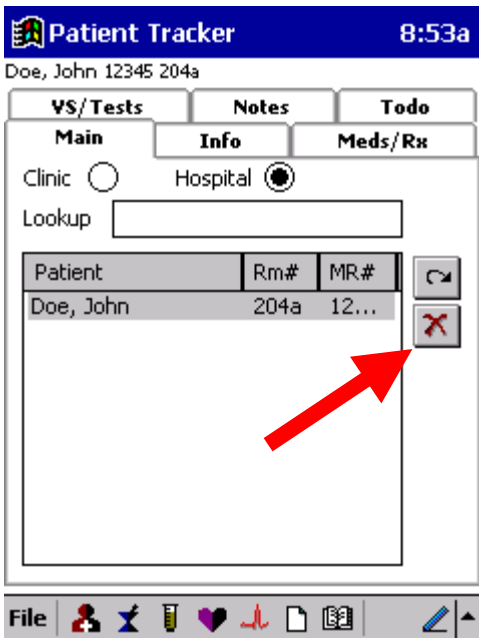


2. Deleting a Patient

a) Make sure the patient that you wish to delete is selected on the main Patient Tracker™ Screen.

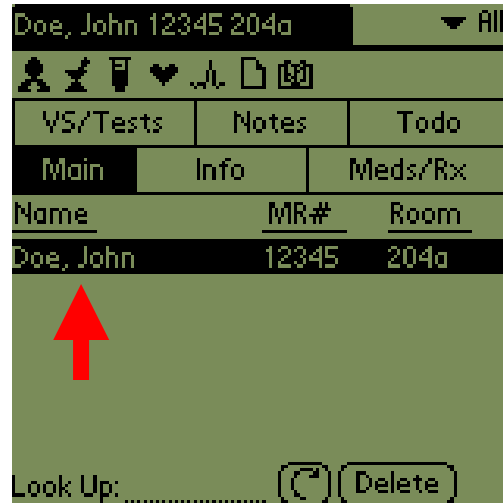
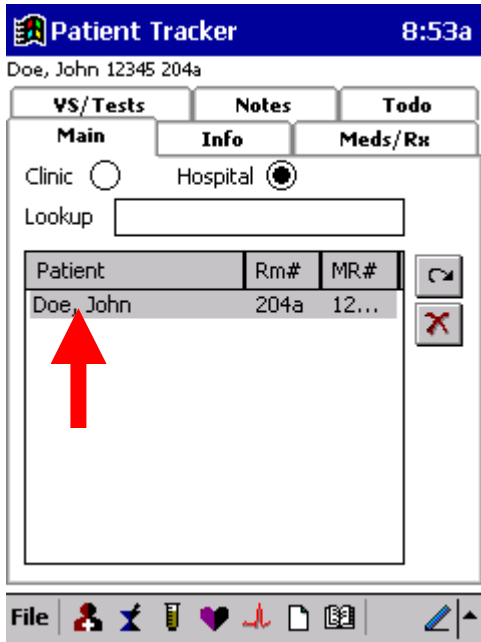


b) Press the Delete Patient Button. A confirmation message will appear, select yes if you are sure that you would like to delete the patient.

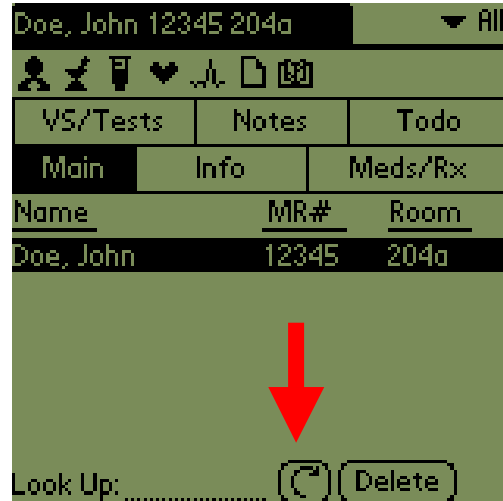
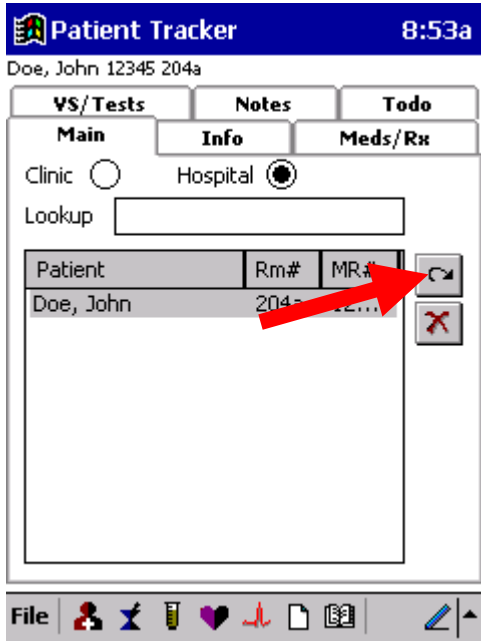


3. Moving a Patient to another Location

- a) Make sure the patient that you wish to delete is selected on the main Patient Tracker™ Screen.

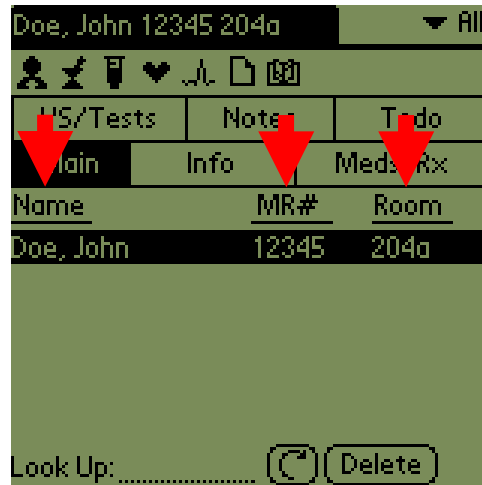
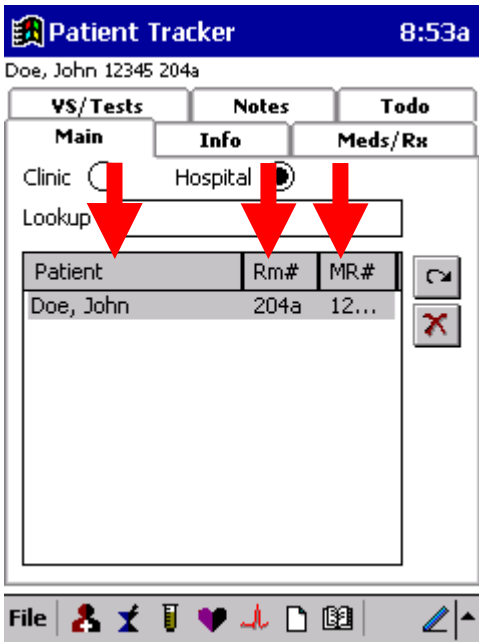


b) Press the Move Patient Button. A confirmation message will appear, select yes if you are sure that you would like to move the patient.



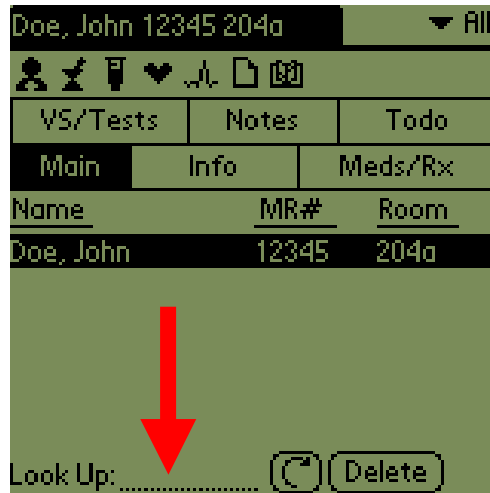
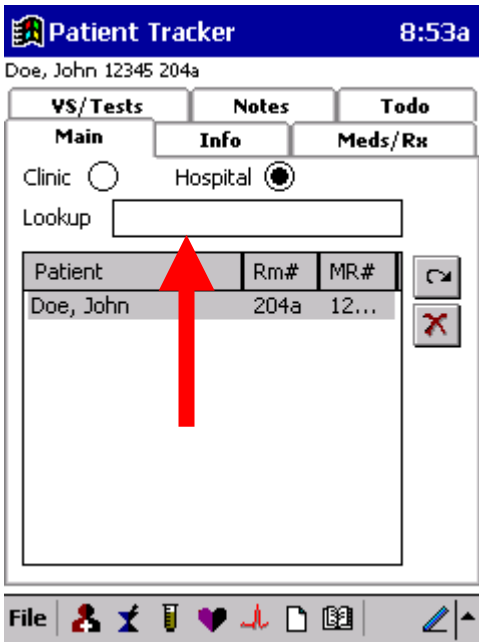
4. Sorting the Patient List

a) The Patient List is sortable by either Last Name, Room Number, or Medical Record Number. To sort, click the heading bar that you wish to sort by. Clicking the bar twice will reverse the sort order.



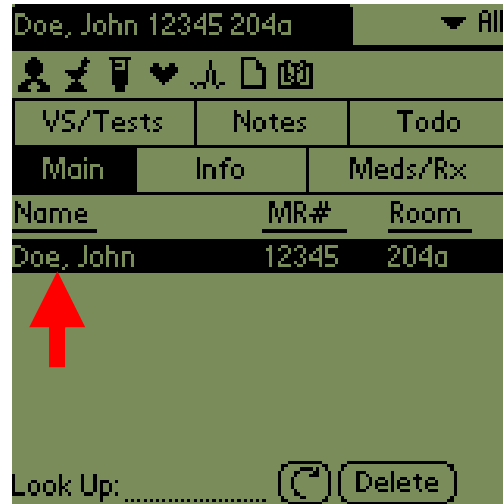
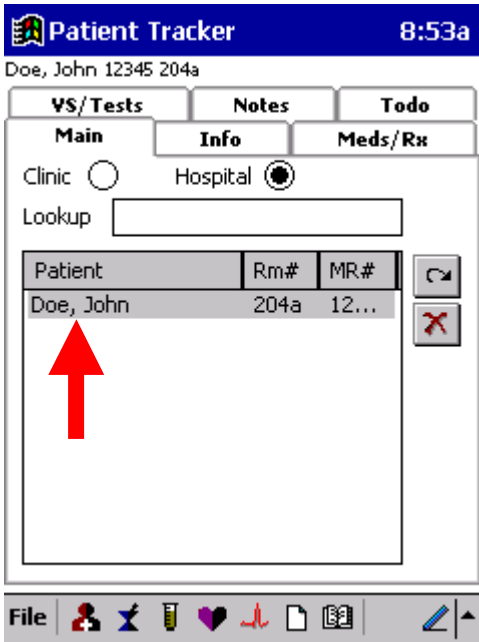
5. Finding a Patient

a) To find a patient quickly in a long Patient List, begin writing the patient's last name in the Lookup Field. The list will scroll as you write the patient's name until it is located.

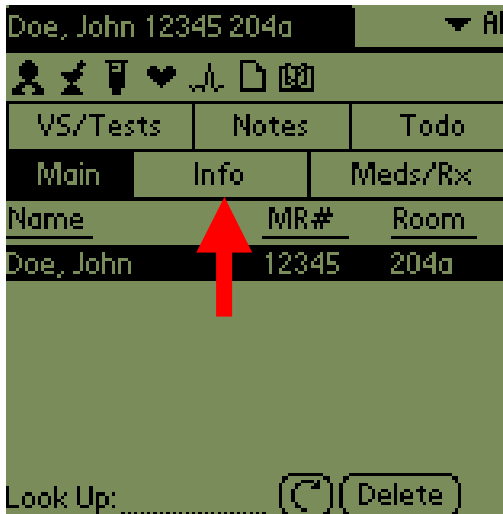
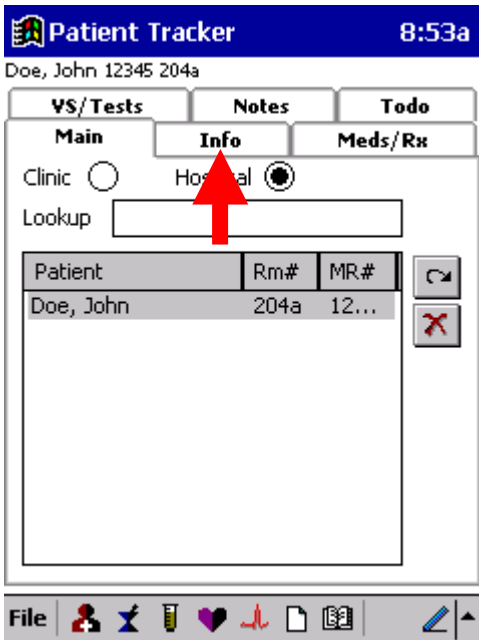


6. Viewing a Patient's Information

a) Make sure the patient that you wish to view is selected on the main Patient Tracker™ Screen.



b) Click the Info Tab.




7. Editing a Patient's Information

- Select the Info Tab as in step 2 above.
- Modify the information that needs to be changed.
- Click the Save Record button.

Patient Tracker 9:01a
Doe, John 12345 204a

VS/Tests	Notes	Todo
Main	Info	Meds/Rx

MR# 12345 Dr Jones 


Age 70 Years Race White

Sex Male Date 9/11/00

Dx COPD exacerbation

Code DNI Rm# 204a

Problems
COPD
HTN
CHF

File 

Doe, John 12345 204a

VS/Tests	Notes	Todo
Main	Info	Meds/Rx

Admit Date: Mon 11/6/00

MR#: 12345


Room#: 204a

Doctor: Jones

Age: 70

Units: Years

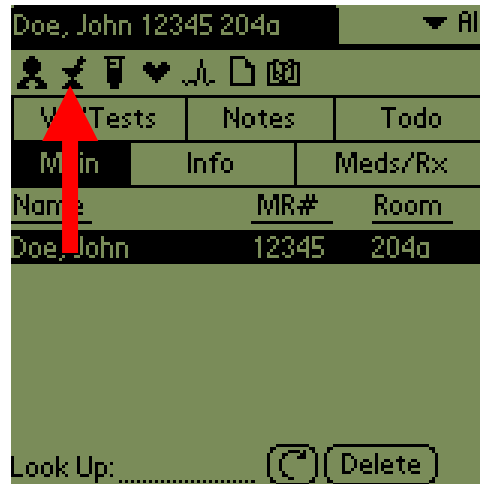
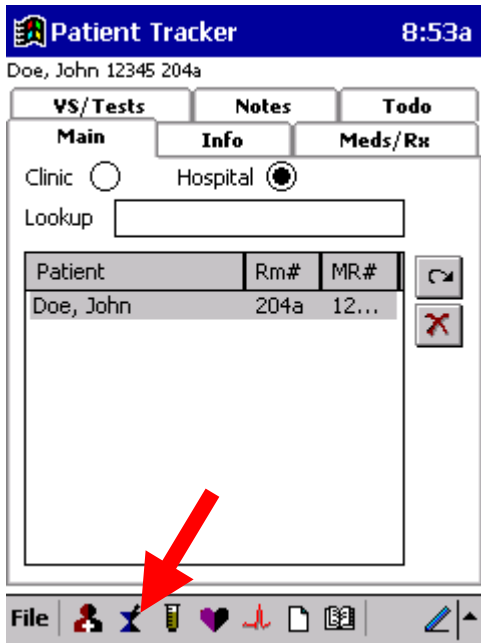
Race: White

Save 

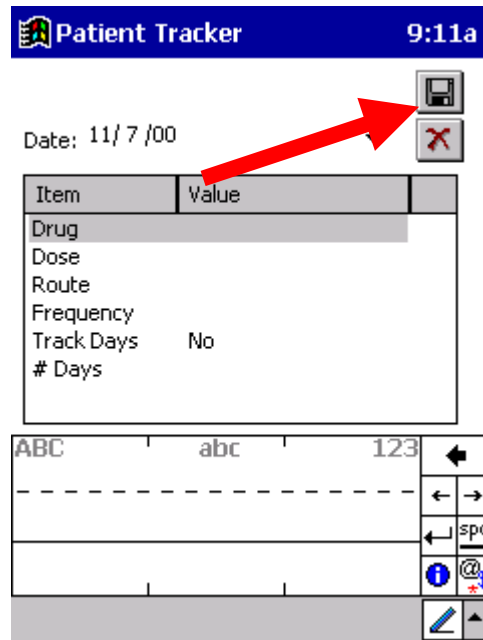
C. Medications

1. Adding a Medication

a) Press the Add Medication Button



b) Windows CE: Enter in the date, drug name, dosage, route, and frequency. You may customize these lists for more rapid entry by pressing on the words Drug, Dose, etc (See Editing Categories). If you would like for Patient Tracker™ to track the total number of days a patient has been on a medication, and then discontinue that medication on a predetermined day- Select Track Days → Yes, then select the number of days you would like the patient on the medication. Press the Save Record Button.



c) Palm OS: Enter in the date, drug name, dosage, route, and frequency. If you would like for Patient Tracker™ to track the total number of days a patient has been on a medication, and then discontinue that medication on a predetermined day- Select Track Days → Yes, then select the number of days you would like the patient on the medication. Press the Save Record Button.

d) Palm OS: Favorites- Entering a new medication, and then pressing the “Fav!” button will add a medication to your favorites list. The favorites list is then accessible by

selecting the drug name from the pop-up list associated with the drug. Selection of the favorite from that list will cause all of the fields to become populated.

Add Meds

Date: ▼ Wed 4/18/01

Drug:

Dose:

Route:

Frequency:

Track Days:

Days:

Dispensed:

Refills:

(Fav!) (Cancel) (Done)

2. Viewing a Patient's Medications

a) Make sure the patient that you wish to view is selected on the main Patient Tracker™ Screen.

Patient Tracker 8:53a

Doe, John 12345 204a

VS/Tests Notes Todo

Main Info Meds/Rx

Clinic Hospital

Lookup

Patient	Rm#	MR.#
Doe, John	204a	12...

File [Icons]

Doe, John 12345 204a ▼ All

[Icons]

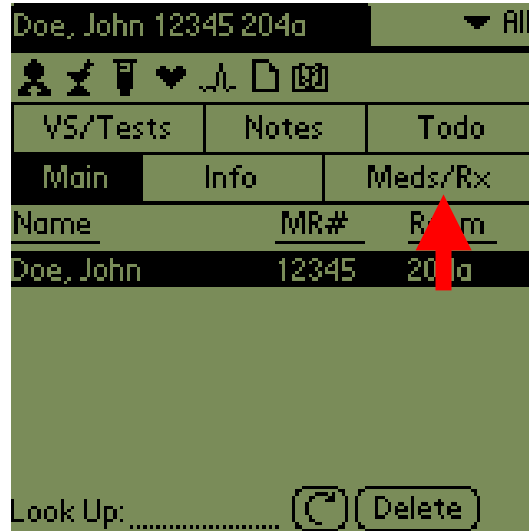
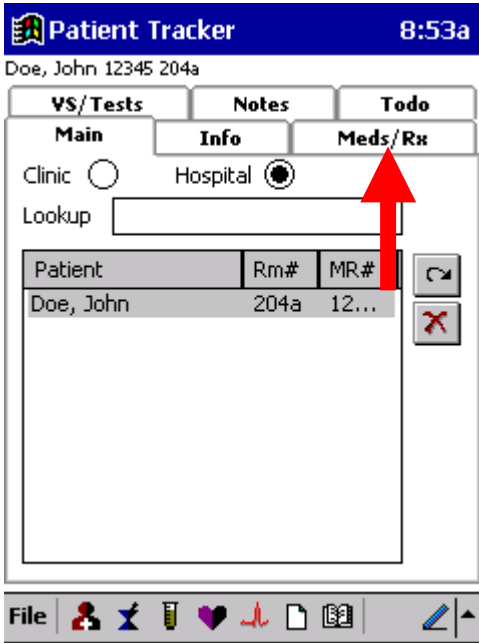
VS/Tests Notes Todo

Main Info Meds/Rx

Name	MR.#	Room
Doe, John	12345	204a

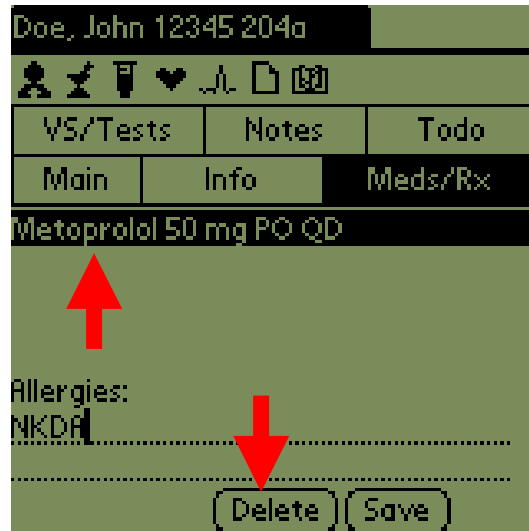
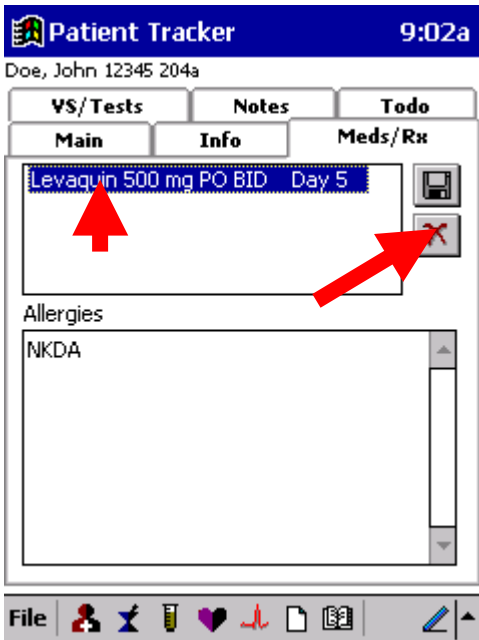
Look Up: [Refresh] (Delete)

b) Select the Medications Tab



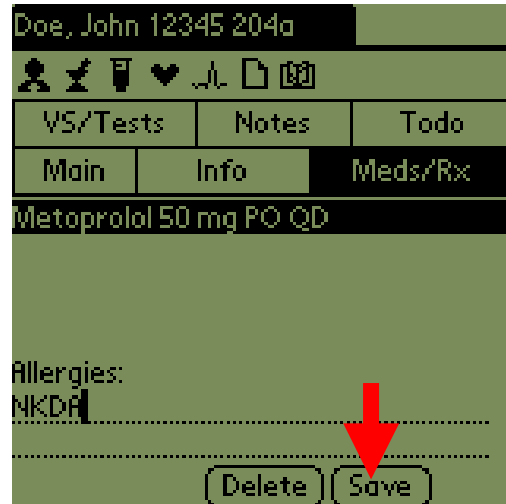
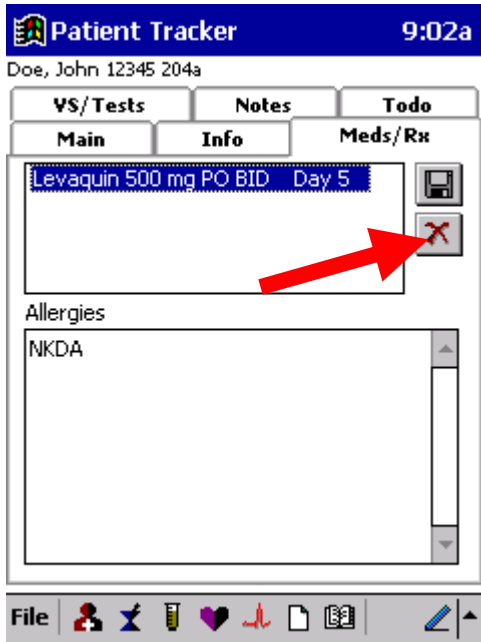
3. Deleting a Medication from a Patient's List

- a) Select the medication that you wish to delete.
- b) Press the Delete Medication button.



4. Editing a Patient's Allergies

- a) Modify the patient's allergies as needed.
- b) Press the Save Record Button.



5. Editing a Patient's Medication (Palm OS only)

a) Select the medication that you wish to edit, then press the Edit button. Make the necessary changes and then press the "Done" button.

Edit Med

Date: ▼ Wed 4/18/01

Drug: ASA

Dose: 25mg

Route: PO

Frequency: Q4H

Track Days:

Days:

Dispensed:

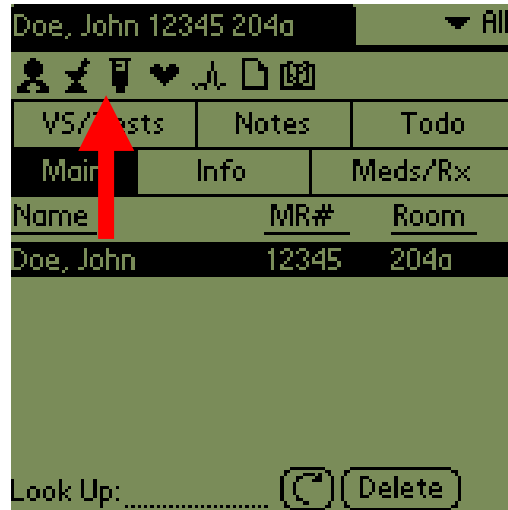
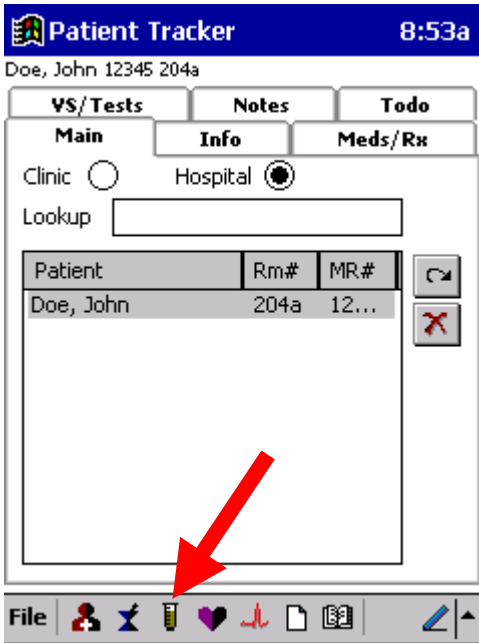
Refills:

Fav! Cancel Done

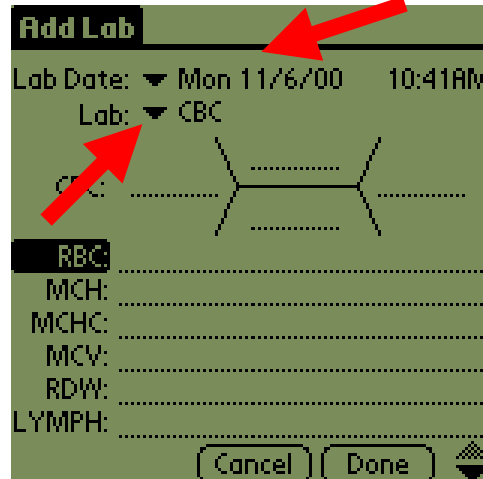
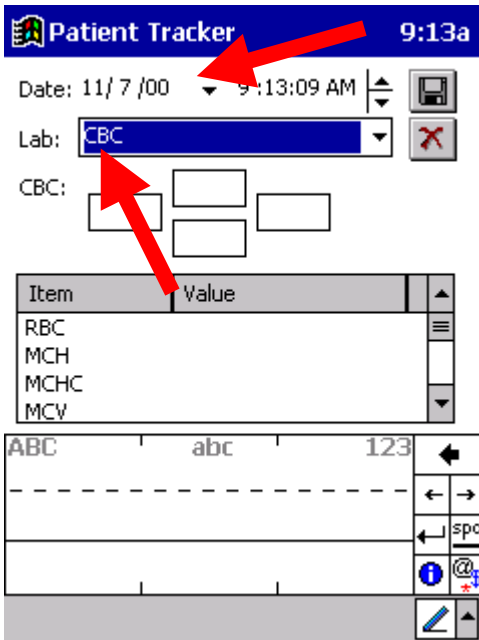
D. Labs

1. Add a Patient's Lab Result

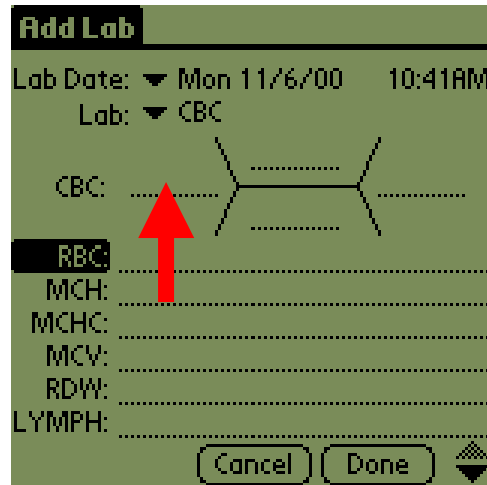
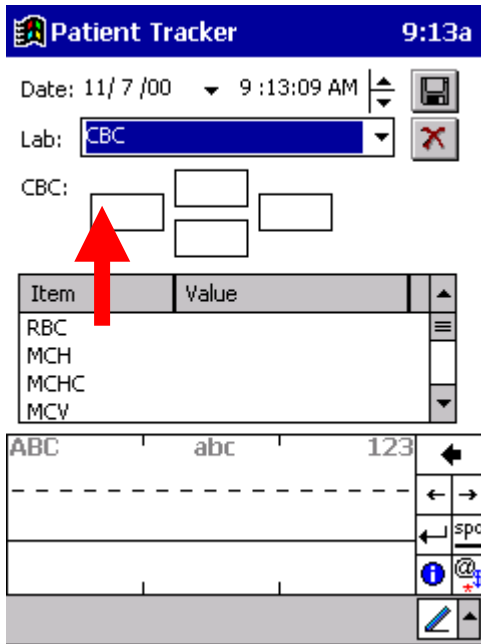
a) Select the Add Lab Result Button.



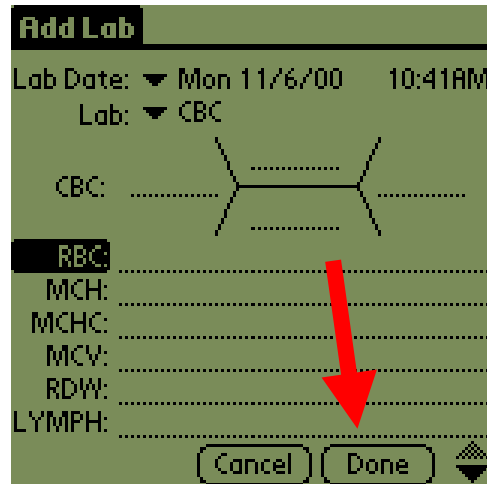
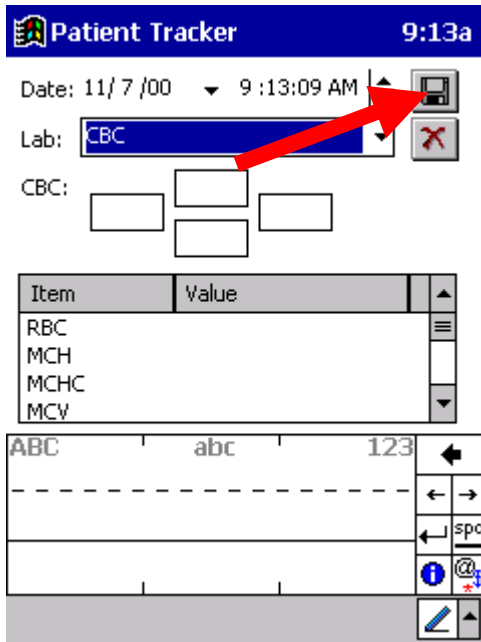
b) Select the date, and the type of labs.



c) Add the lab results.

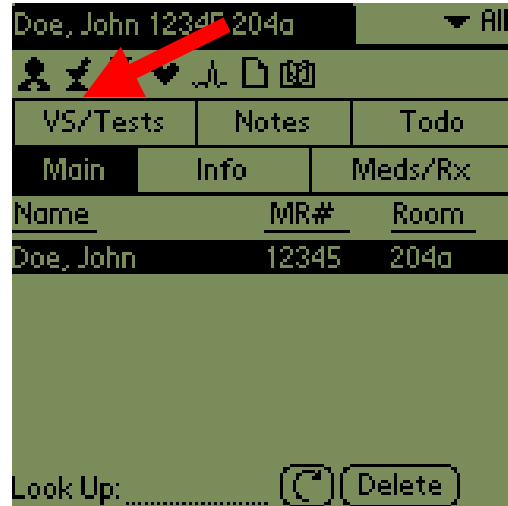
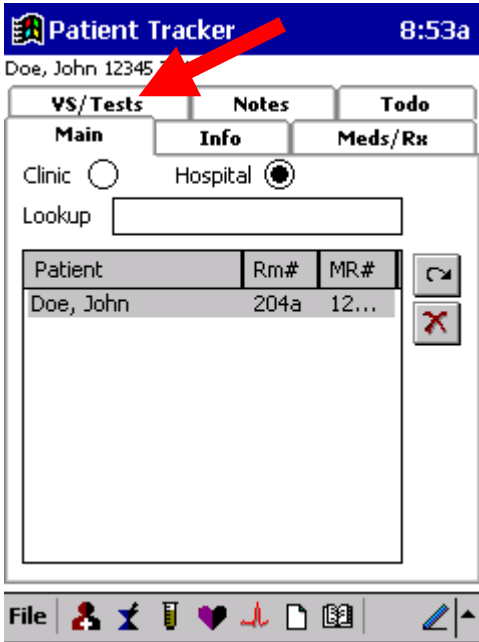


d) Press the Save Record Button.

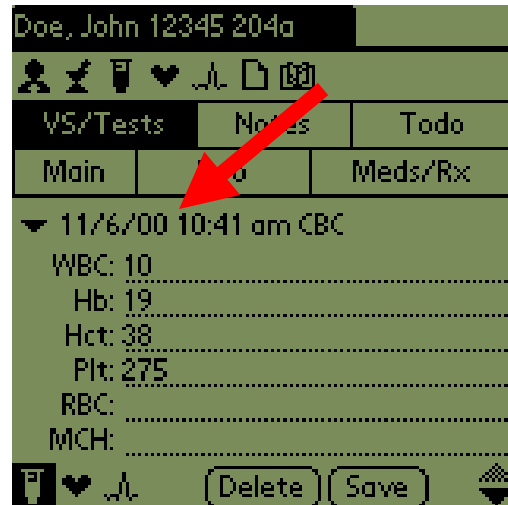
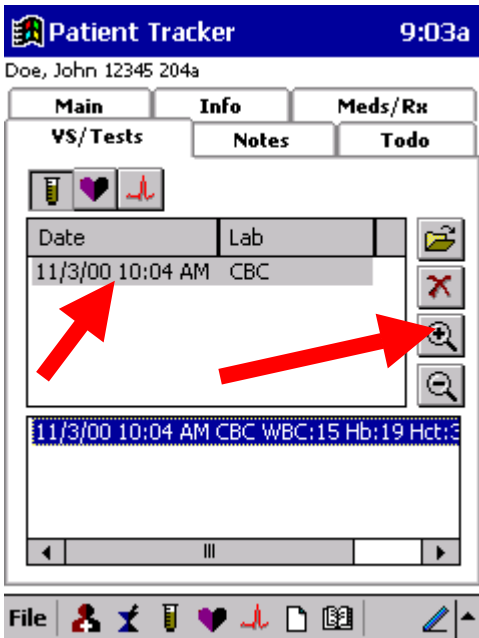


2. View a Patient's Lab Results

a) Select the VS\Tests tab.

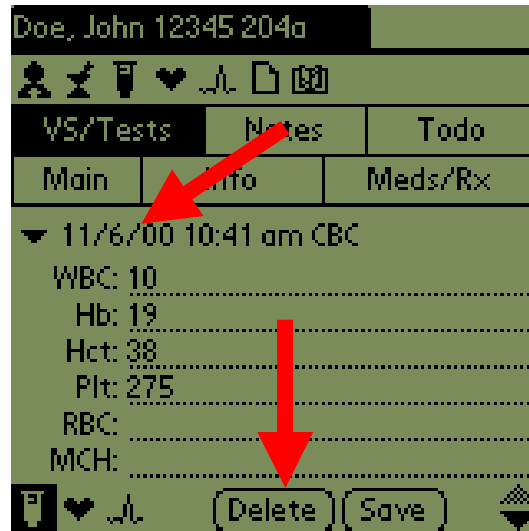
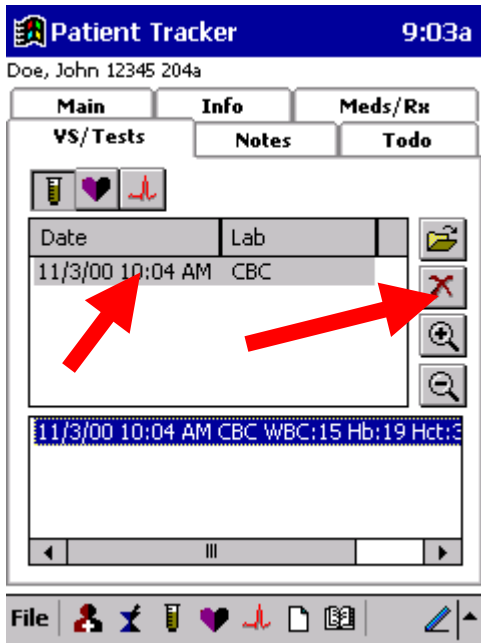


b) Select the labs (May select multiple on CE) that you wish to view, and press the view labs button.



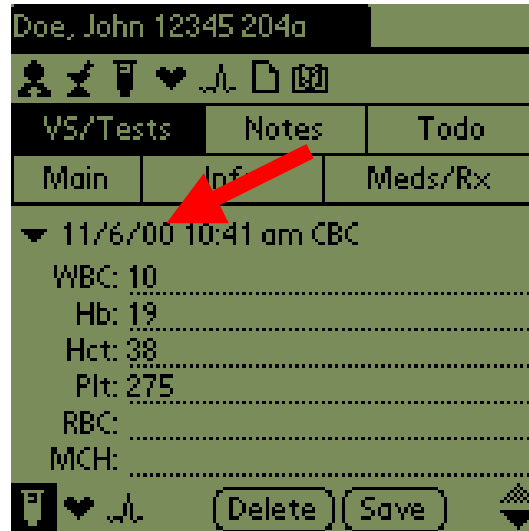
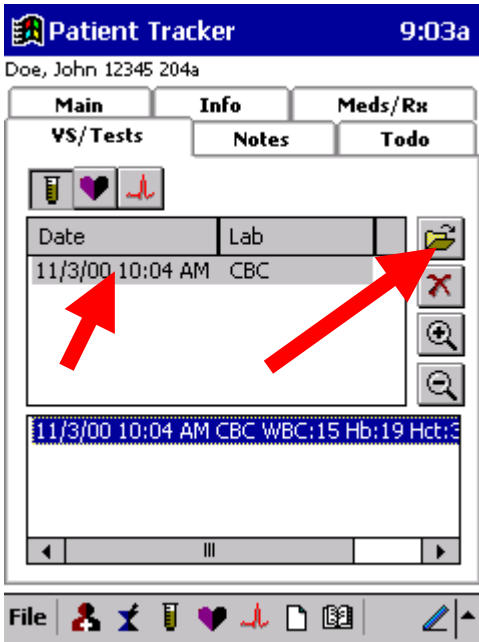
3. Delete a Patient's Lab Result

- a) Select the lab result that you wish to delete, and press the Delete Lab Result Button.

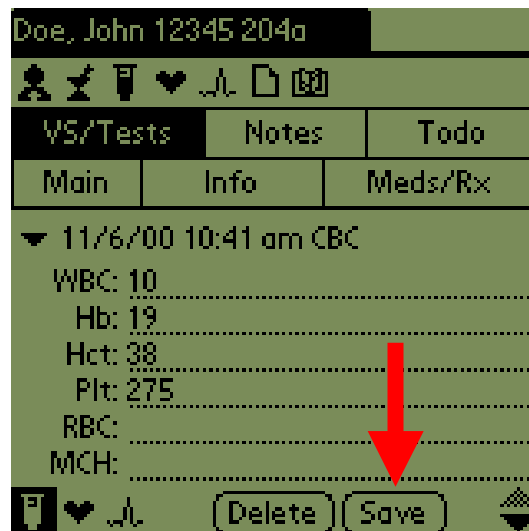
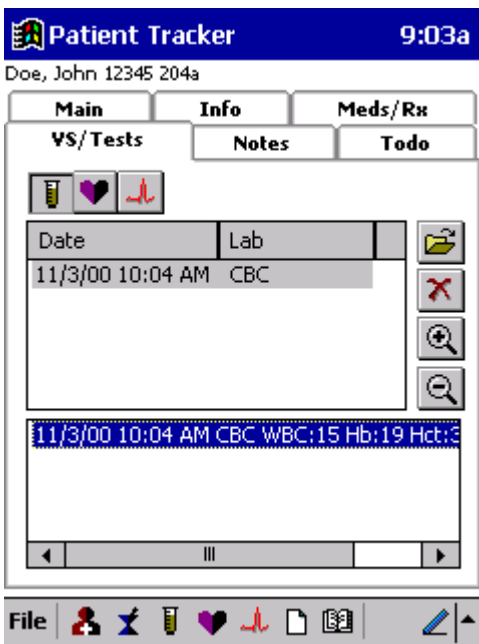


4. Edit a Patient's Lab Result

a) Select the lab result that you wish to edit, and press the Edit Lab Button (Just edit the result on Palm).



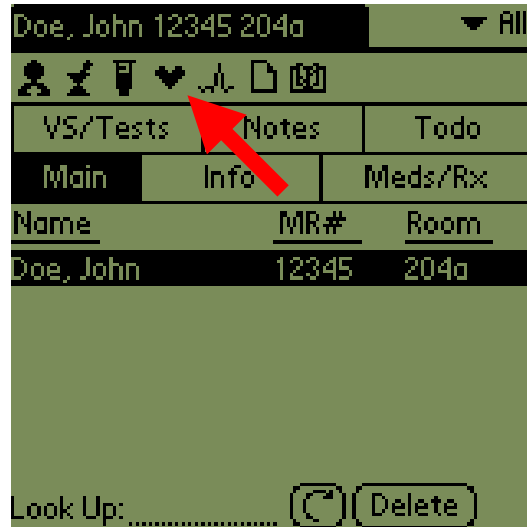
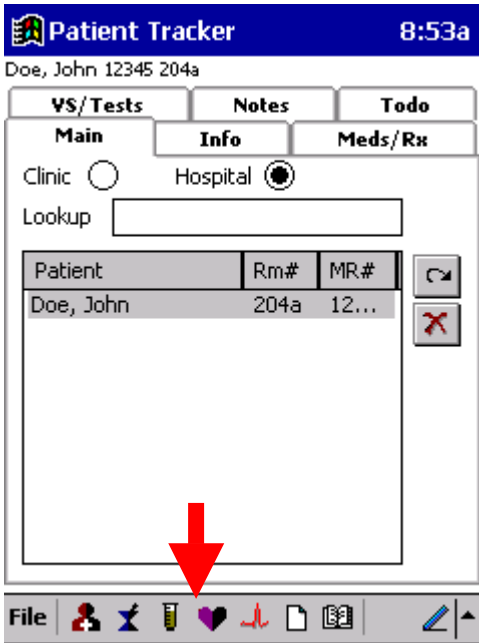
b) Edit the results and press the Save Record Button.



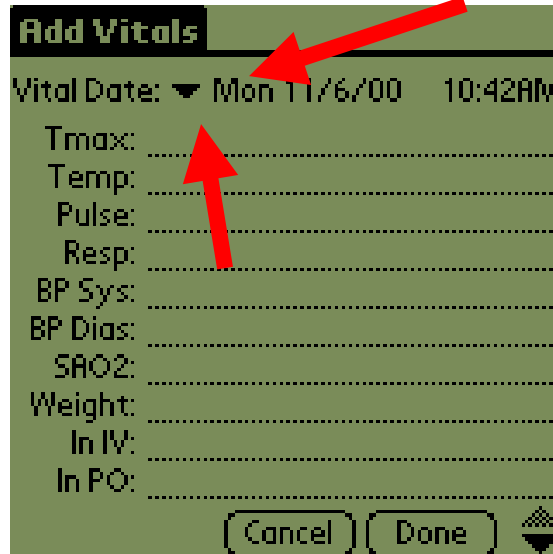
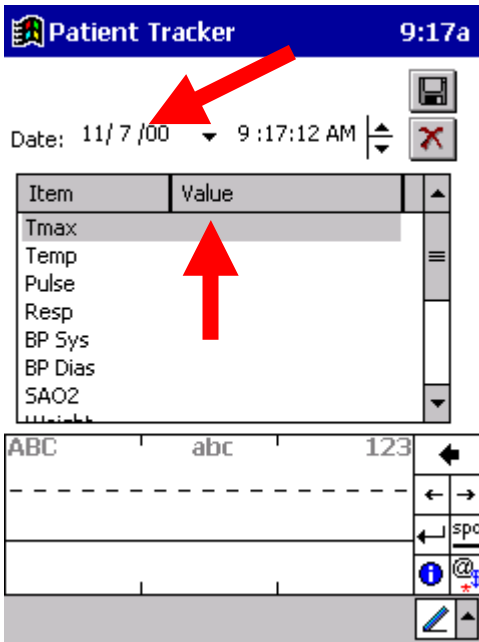
E. Vitals

1. Adding a Vital Signs Result

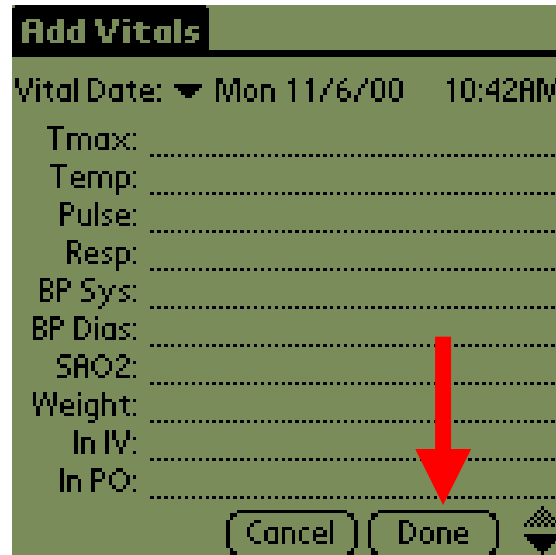
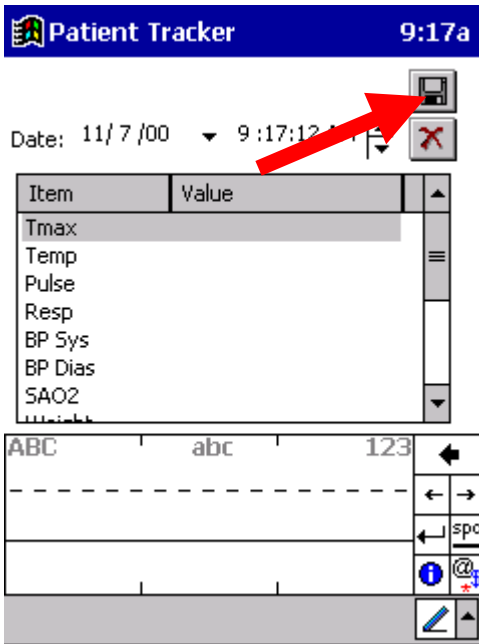
a) Select the Add Vitals Button.



b) Select the date and time, and then add the vital signs.

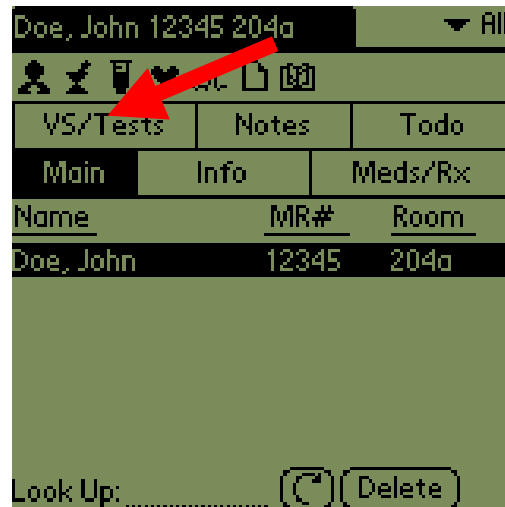
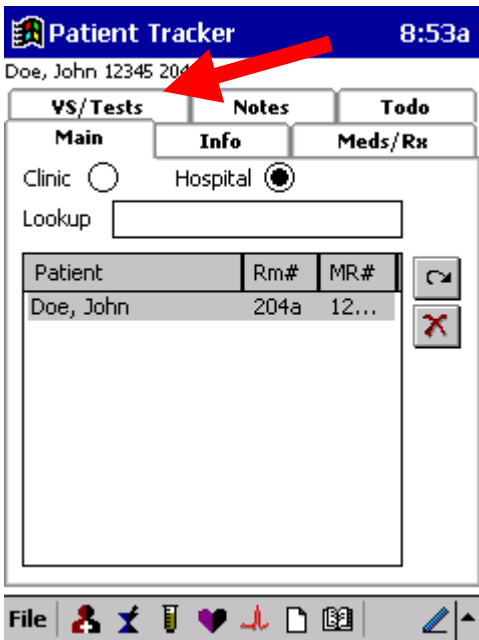


c) Press the Save Record Button.

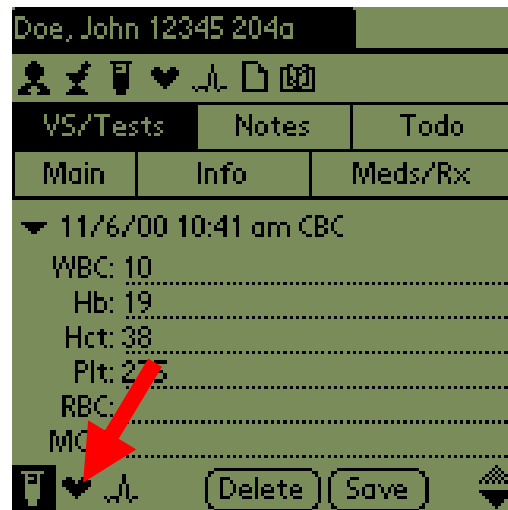
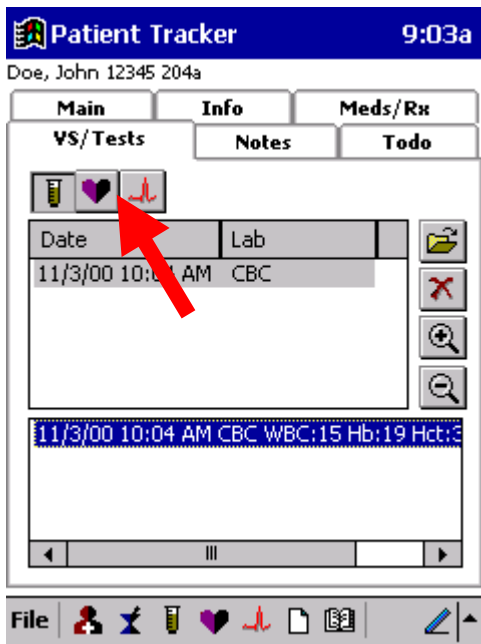


2. View a Patient's Vital Signs

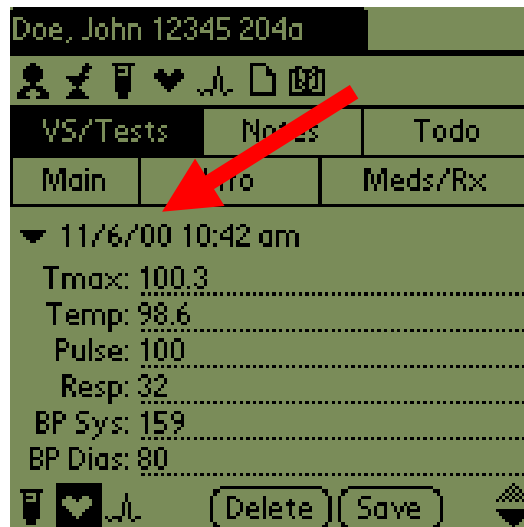
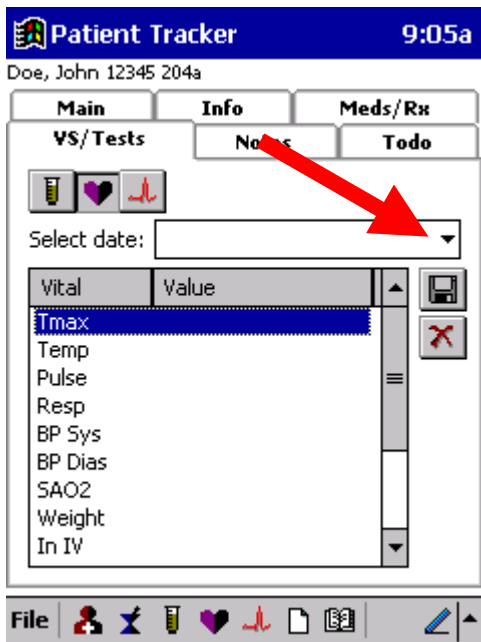
a) Select the VS\Tests tab.



b) Select the Vital Signs button.

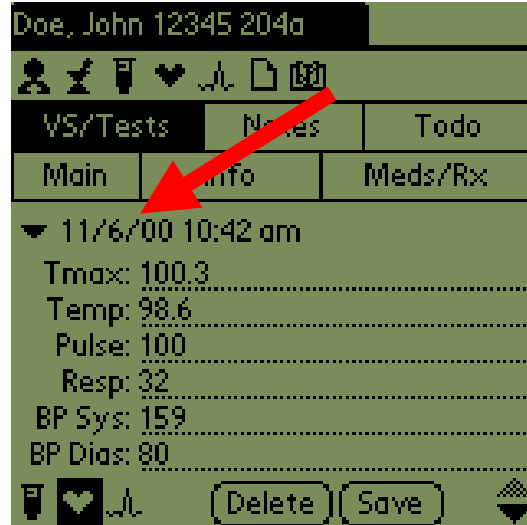
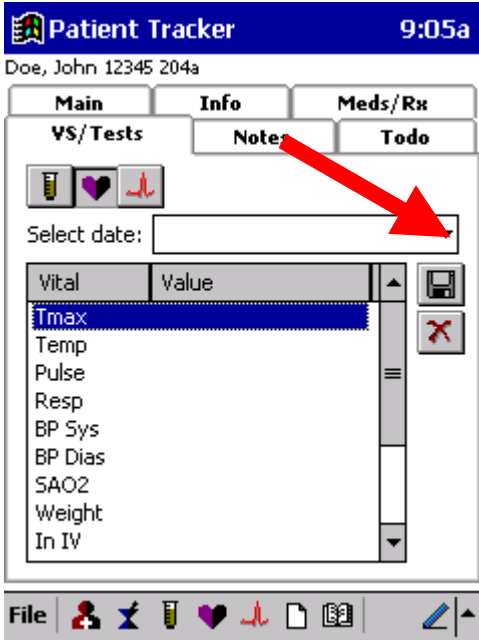


c) Select the Vital Signs that you wish to view.

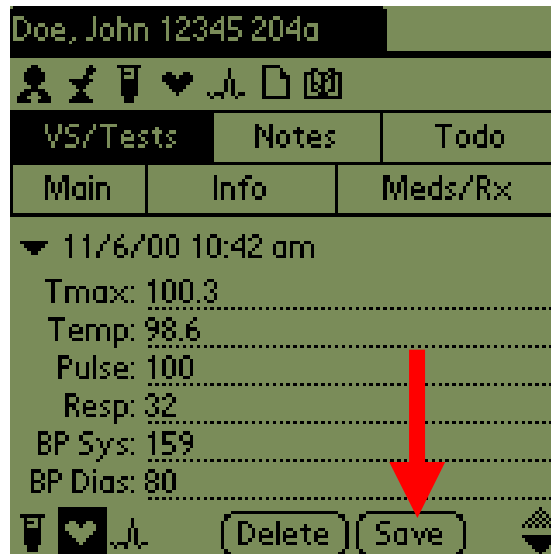
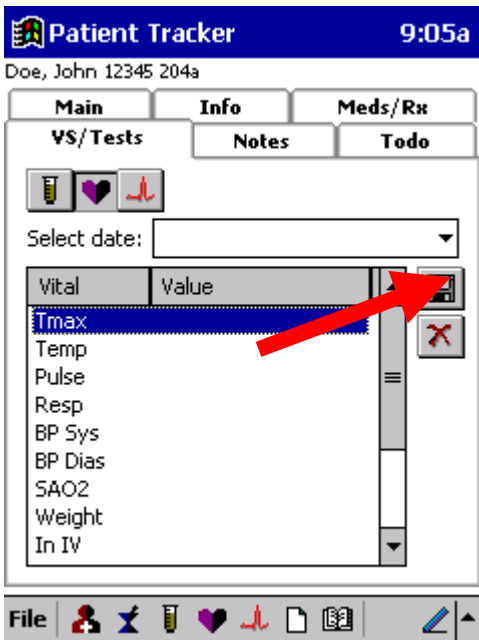


3. Editing a Patient's Vital Signs

a) Select the vital signs that you wish to edit.

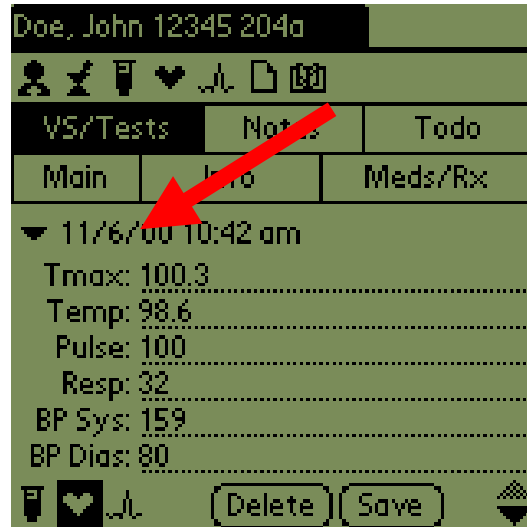
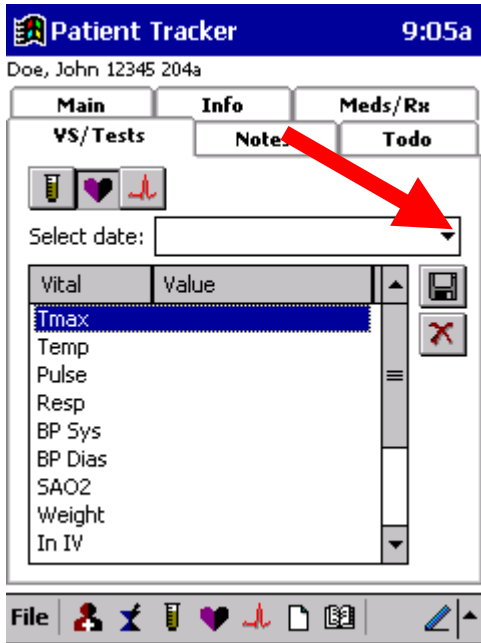


b) Enter the desired changes and press the Save Record Button.

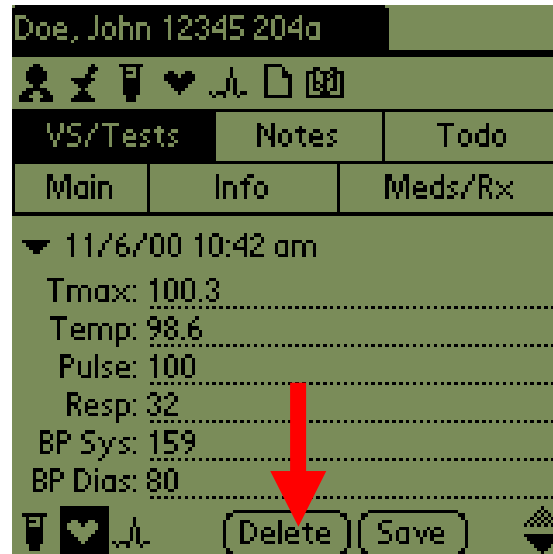
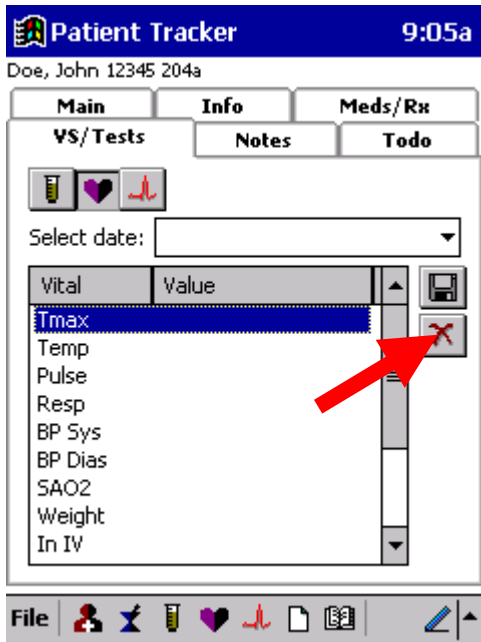


4. Deleting a Patient's Vital Signs

a) Select the vital signs that you wish to delete.



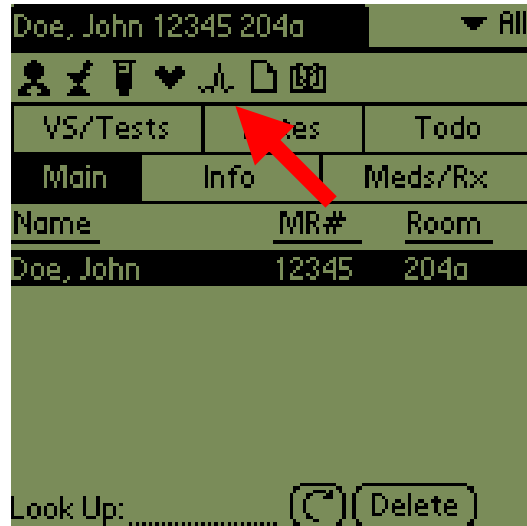
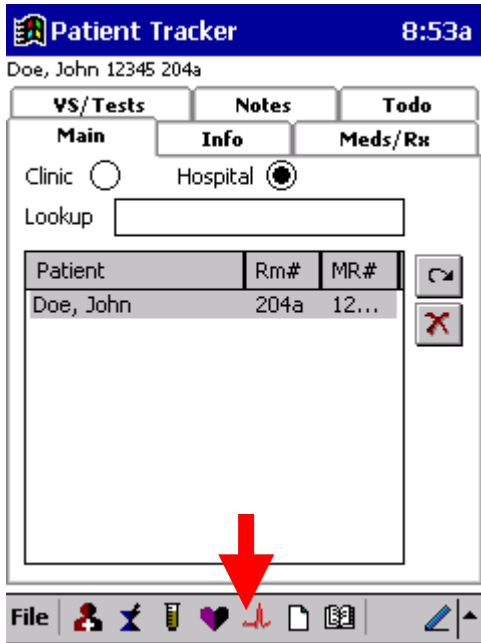
b) Press the Delete Vital Signs Button.



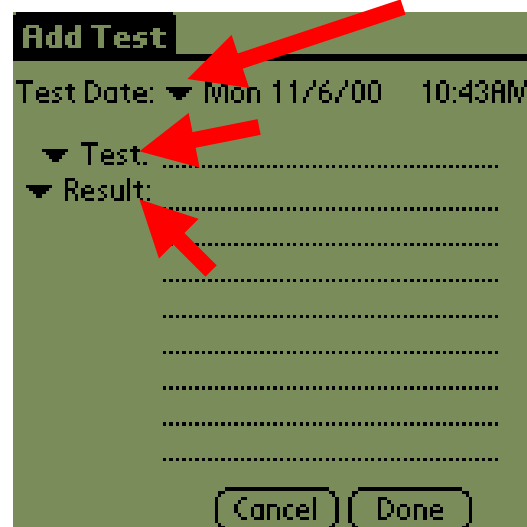
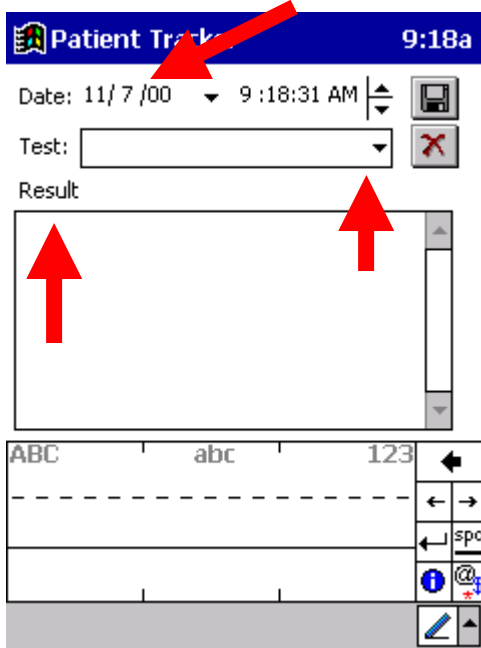
F. Test Results

1. Adding a Test Result

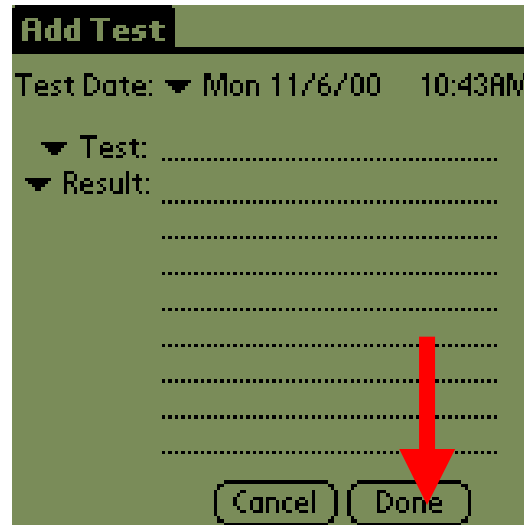
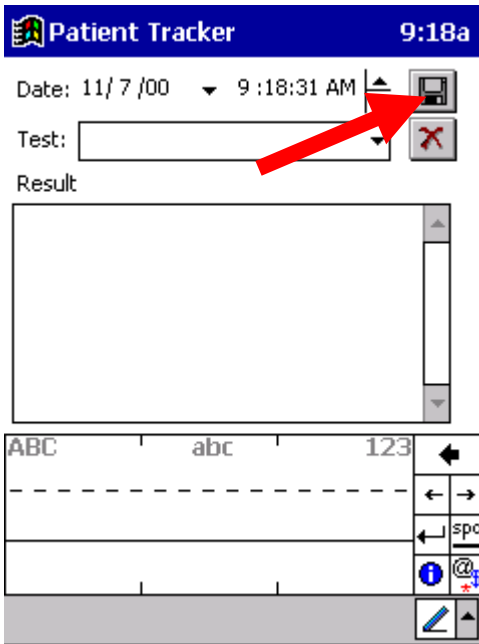
a) Select the Add Test Results Button.



b) Select the date and time, the test type, and then add the result.

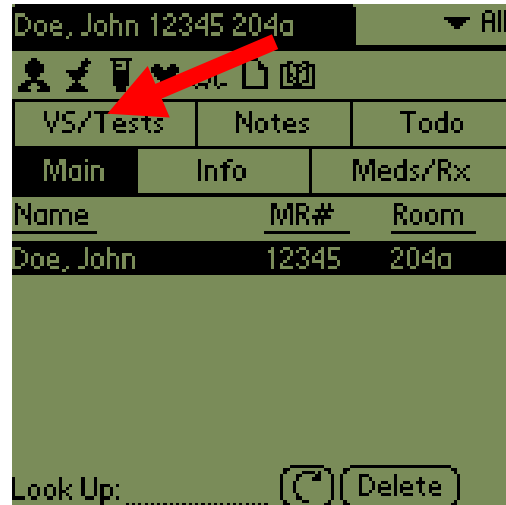
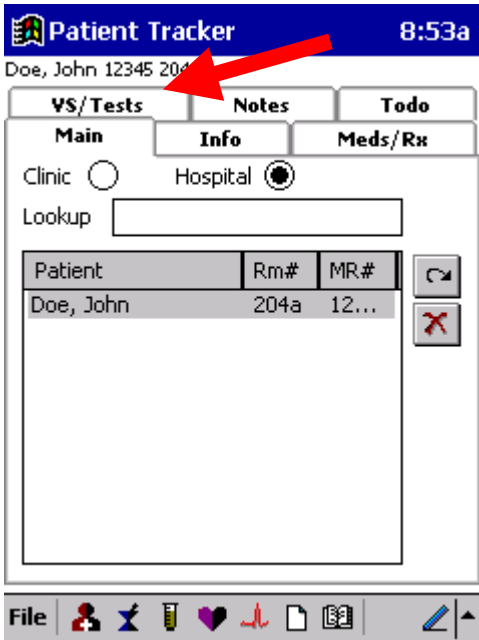


c) Press the Save Record Button.

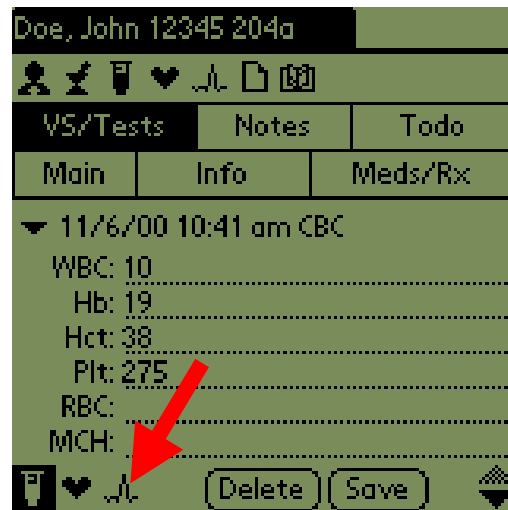
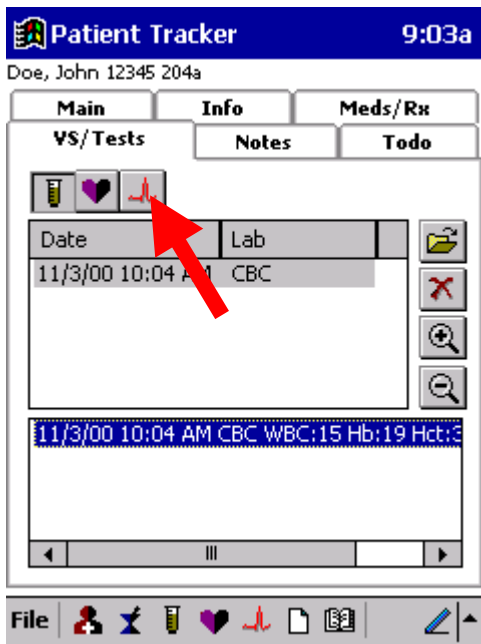


2. View a Patient's Test Results

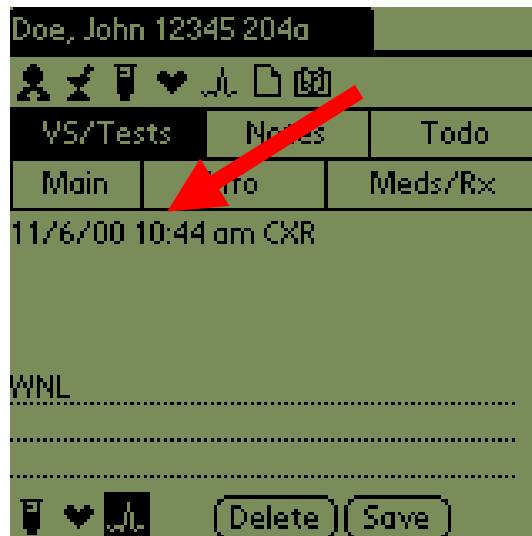
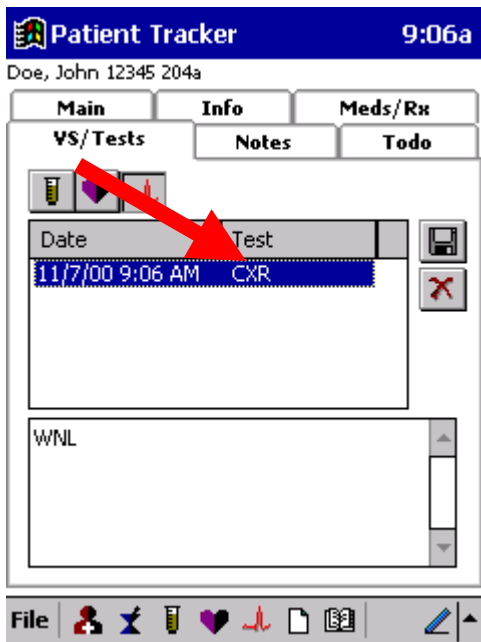
a) Select the VS\Tests tab.



b) Select the Tests Button.

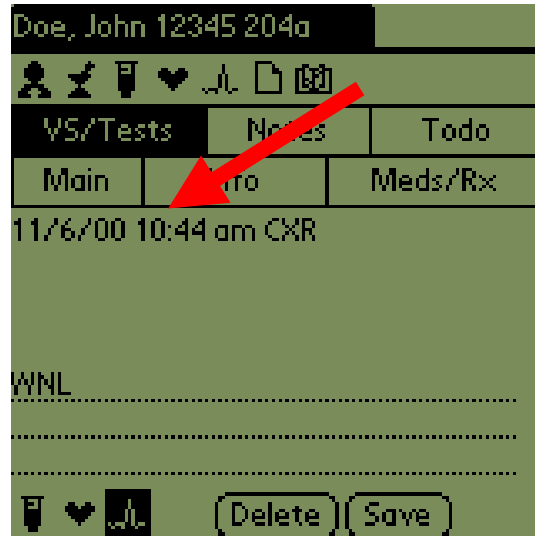
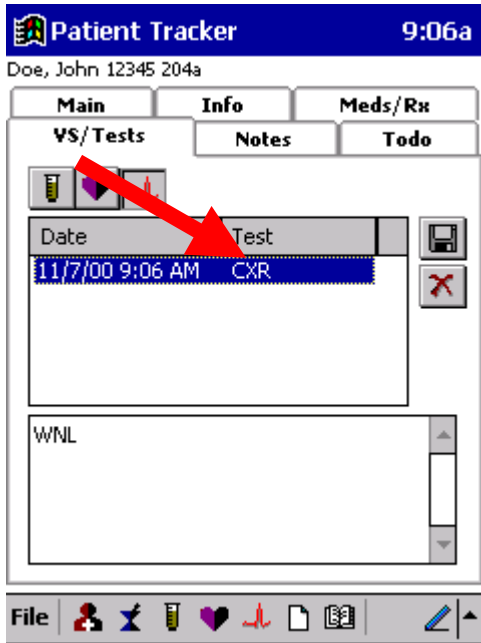


c) Select the test result that you wish to view.

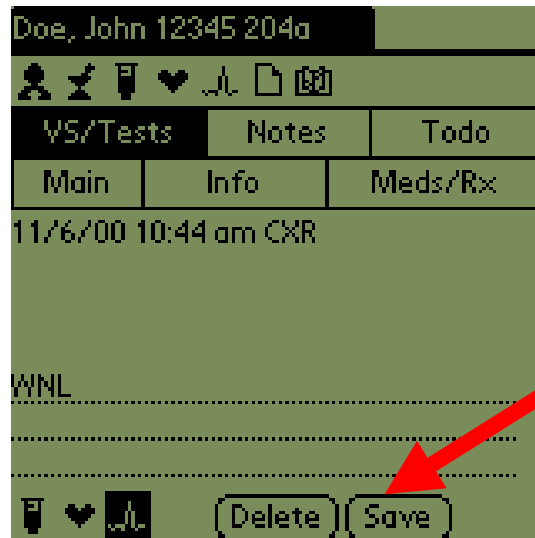
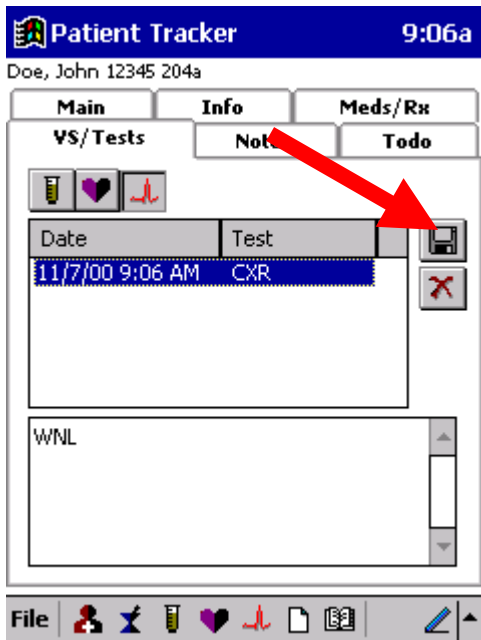


3. Editing a Patient's Test Result

a) Select the test result that you wish to edit.

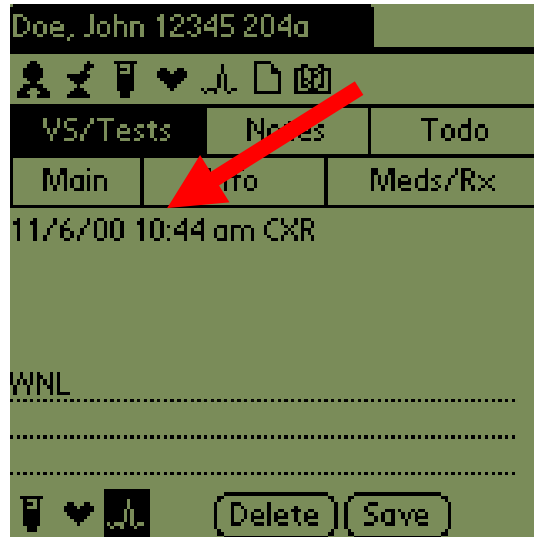
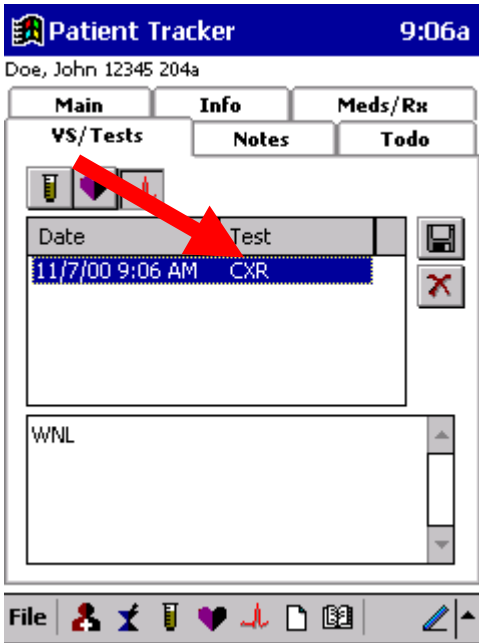


b) Enter the desired changes and press the Save Record Button.

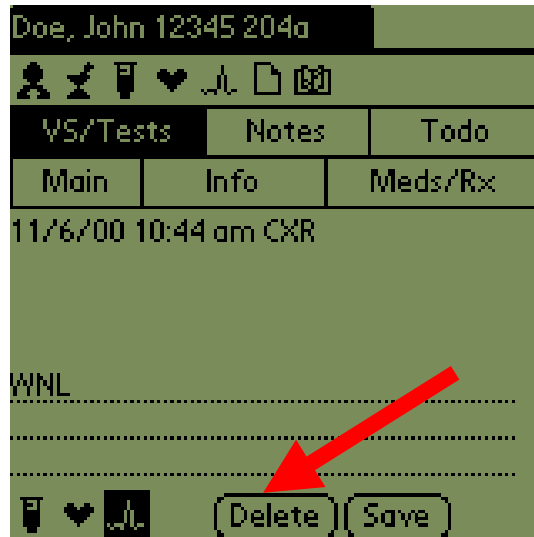
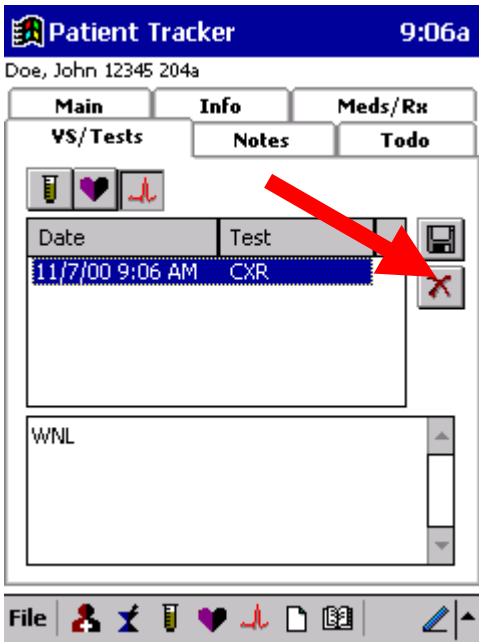


4. Deleting a Patient's Test Result

a) Select the test that you wish to delete.

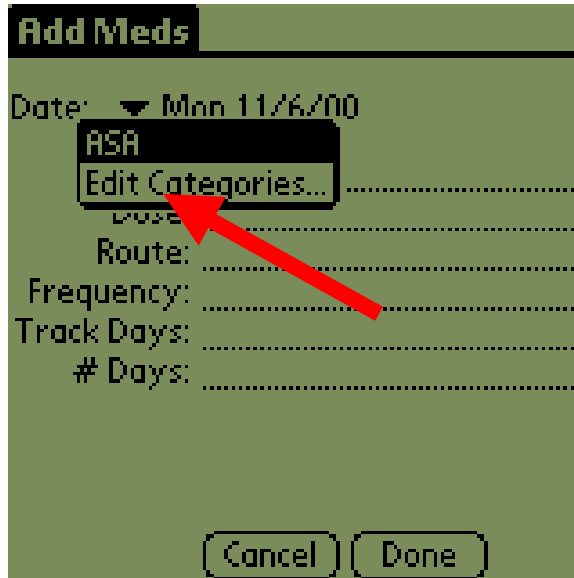
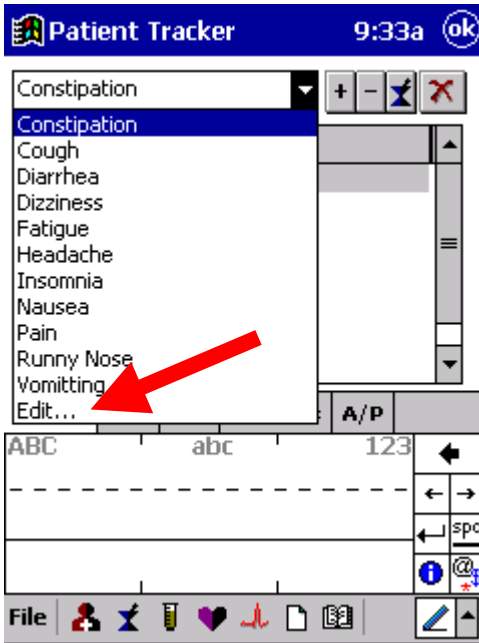


b) Press the Delete Test Button.

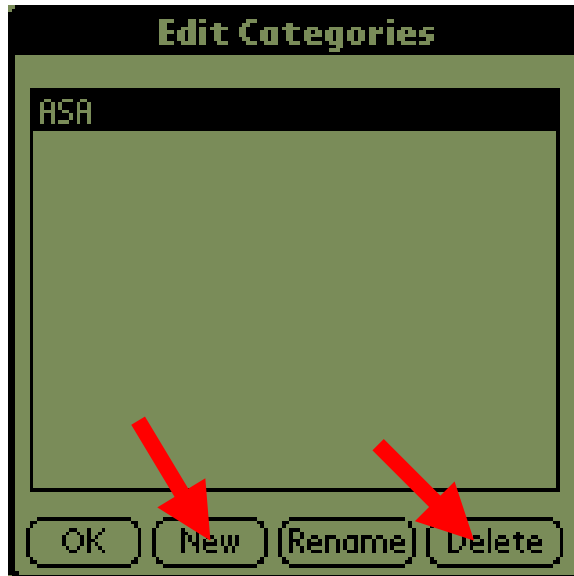
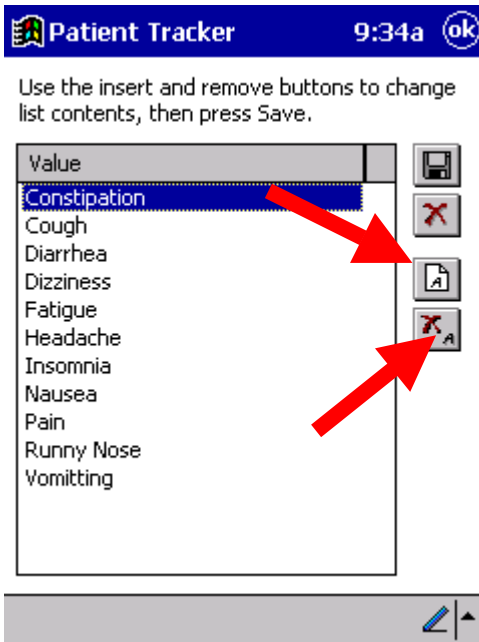


G. Editing Categories

1. Select Edit from the Category List that you wish to edit.



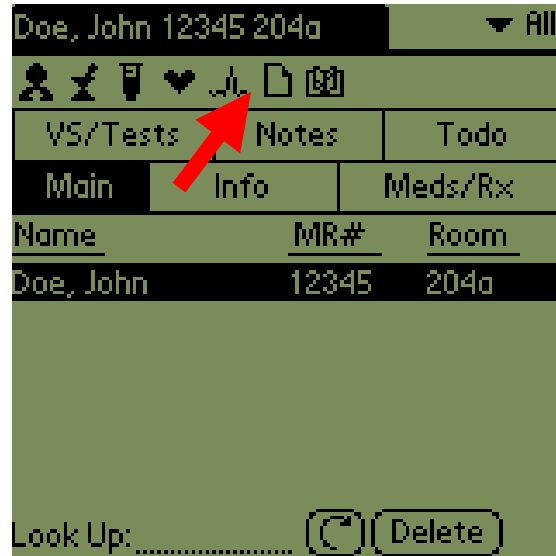
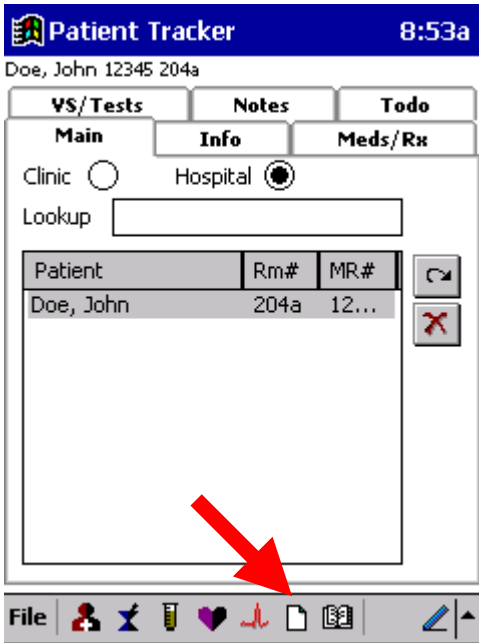
2. Select New to add a new category. Select an existing category and Delete to delete a category.



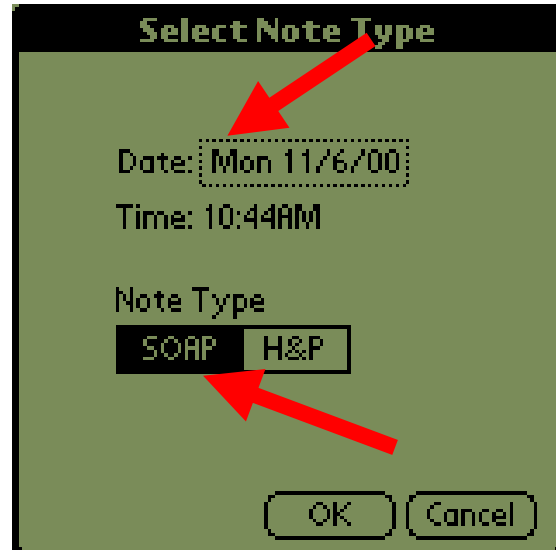
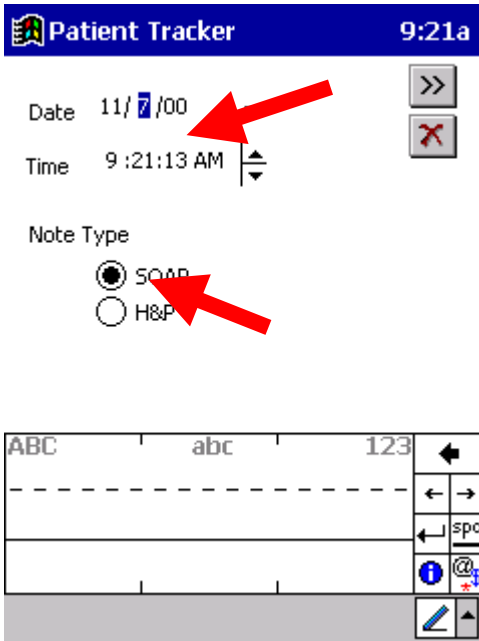
H. Notes

1. Adding a SOAP Note

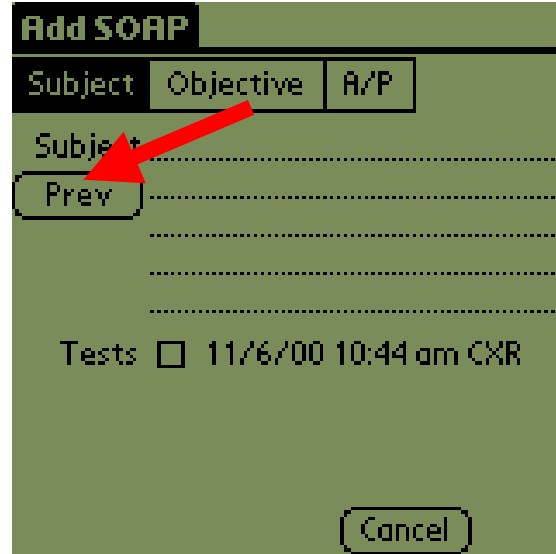
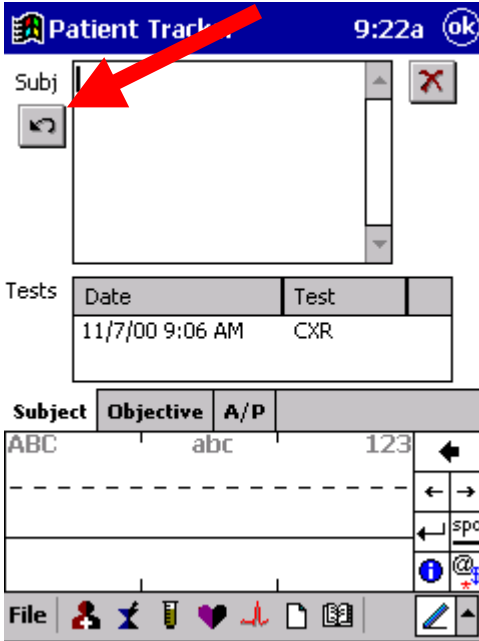
a) Select the Add Note Button.



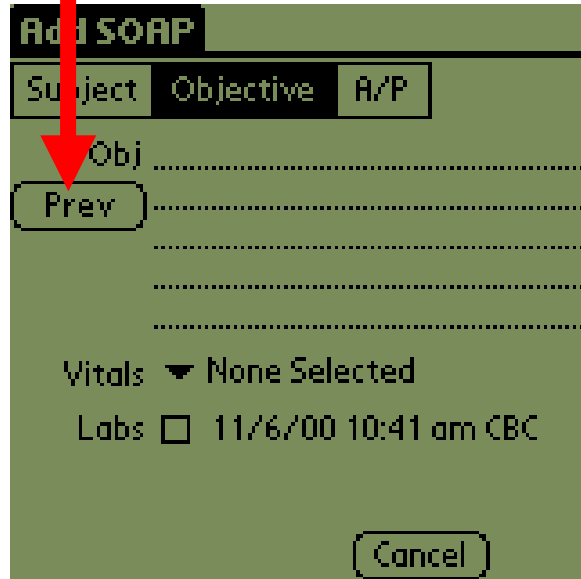
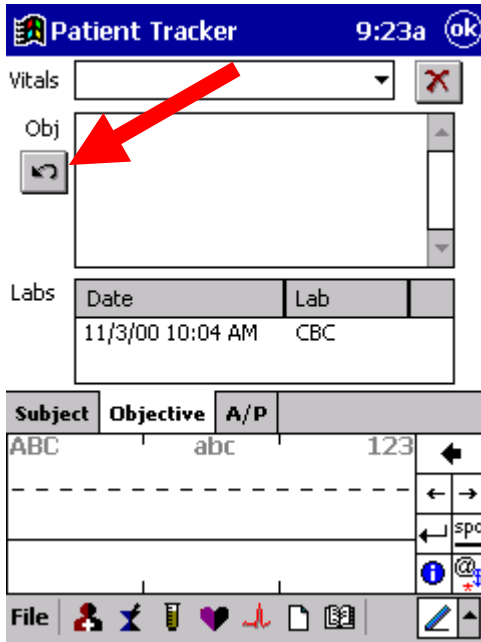
b) Select the time, date and note type.



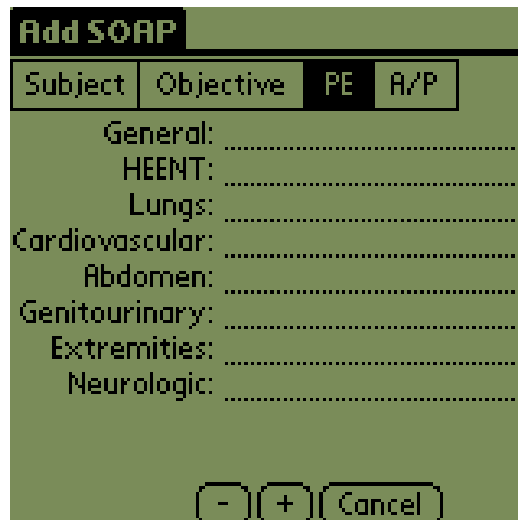
c) Enter the subjective information for the note, as well as any test results that you would like included in the note. **NOTE:** You may import portions of a previous note at any time by pressing the Import Previous Button.



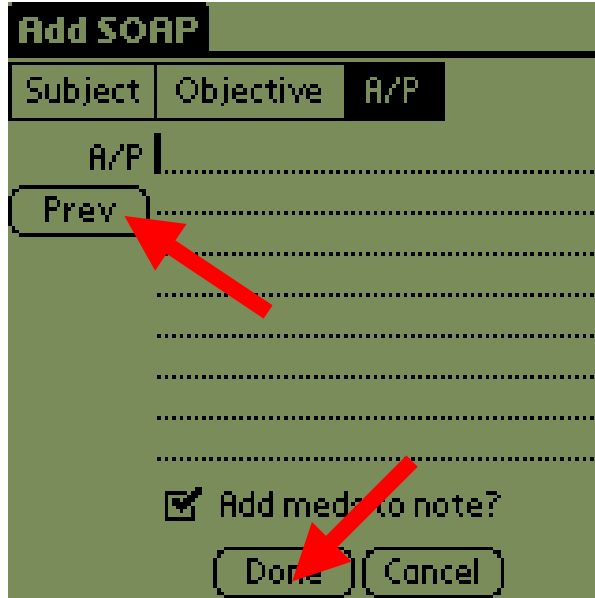
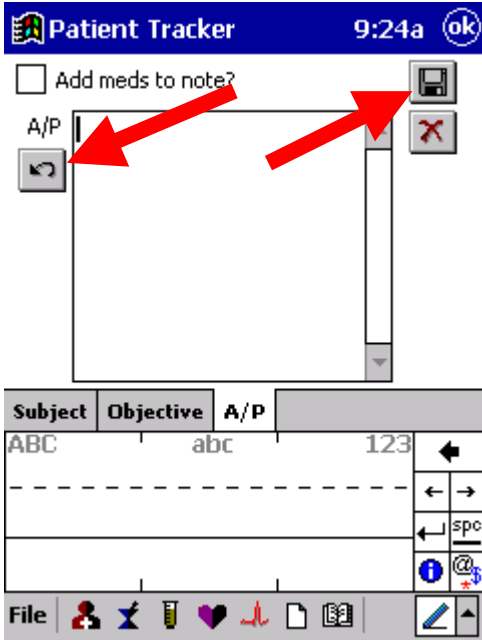
d) Enter the objective information for the note, as well as any Lab results or Vital Signs that you would like included in the note. **NOTE:** You may import portions of a previous note at any time by pressing the Import Previous Button.



e) Palm OS: You may use the PE tab to enter a physical exam in your objective portion of the note.

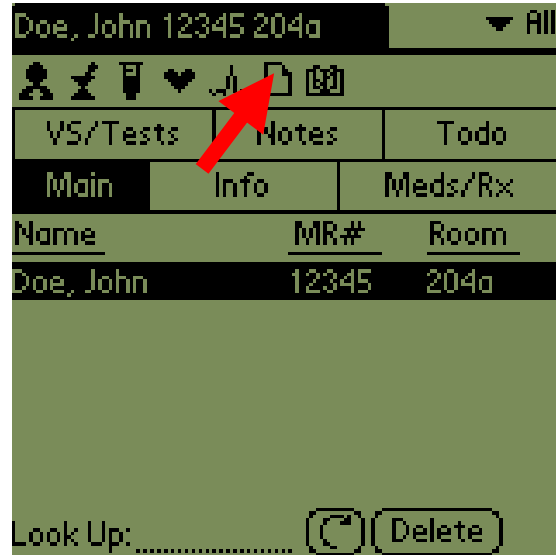
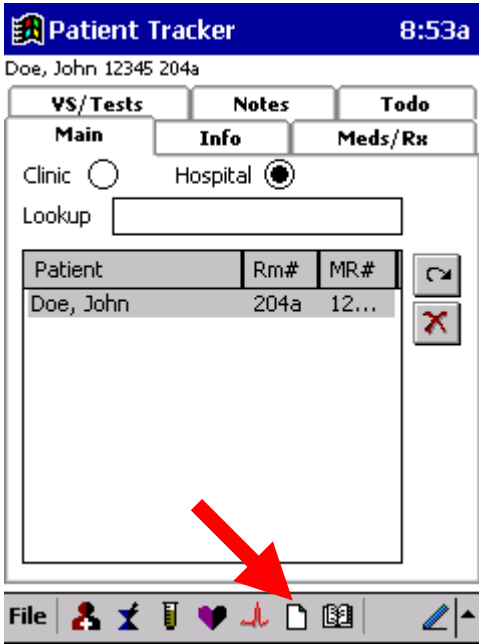


f) Enter the Assessment and Plan. If you would like to include a medication list for the patient in your note, check the Add meds to note. Press the Save Record Button. **NOTE:** You may import portions of a previous note at any time by pressing the Import Previous Button.

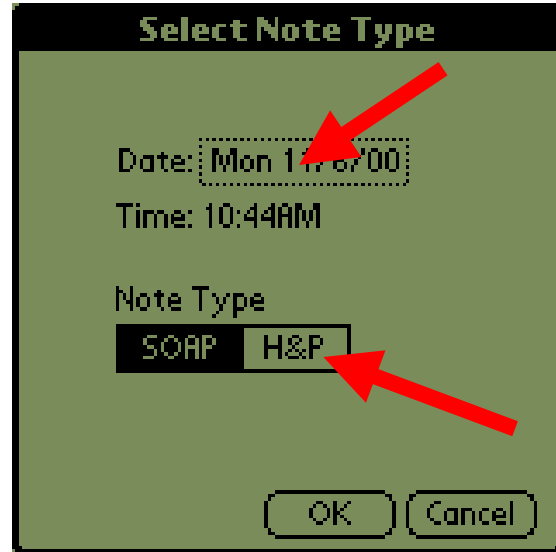
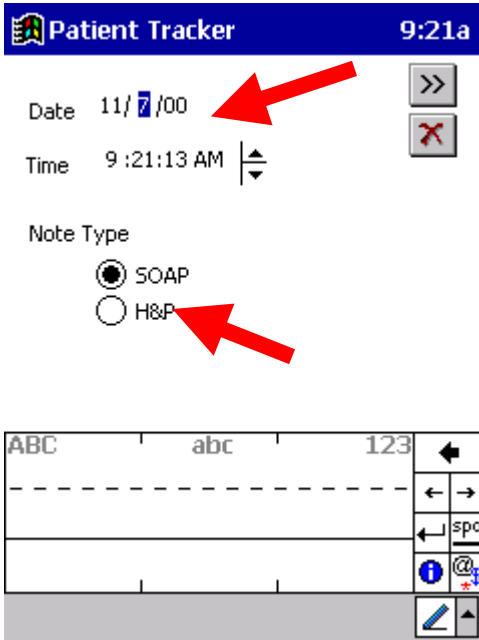


2. Adding a History and Physical

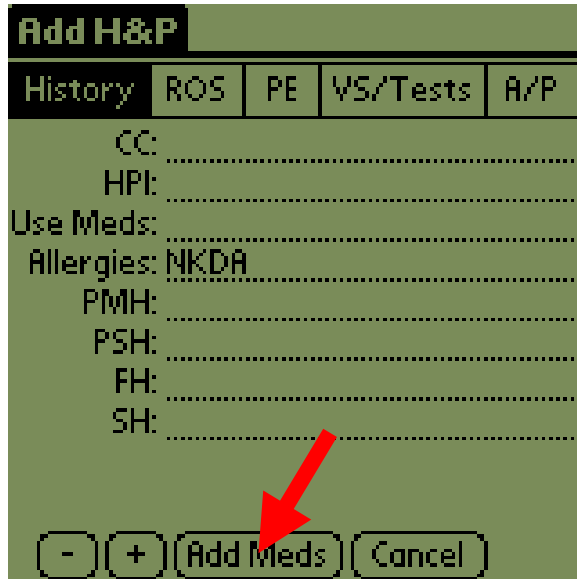
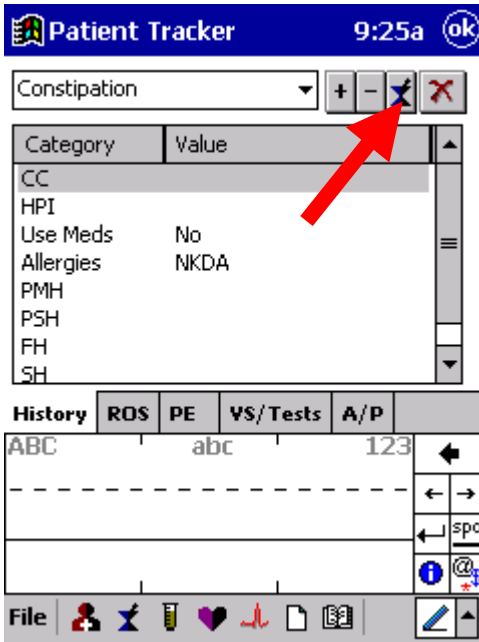
a) Select the Add Note Button.



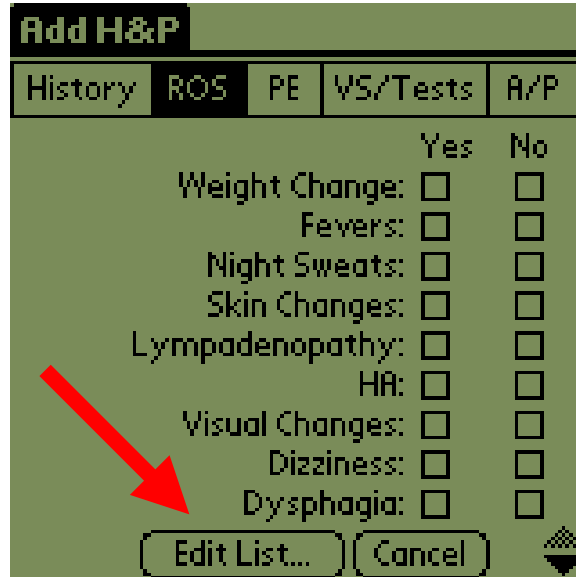
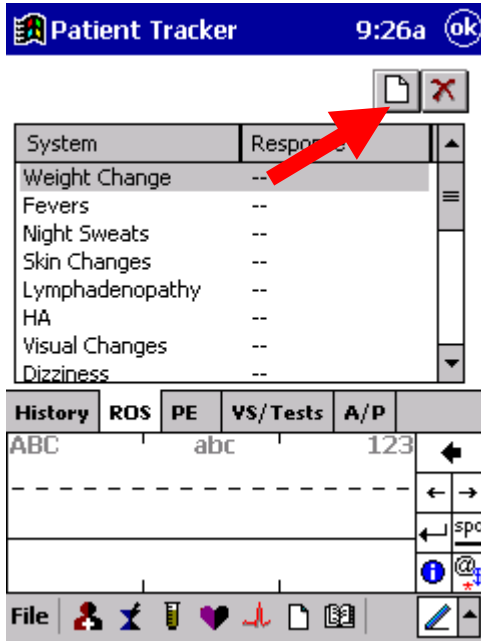
b) Select the time, date and note type.



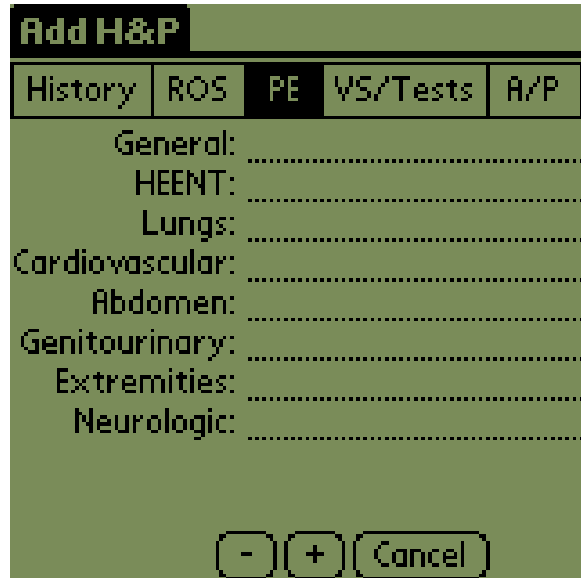
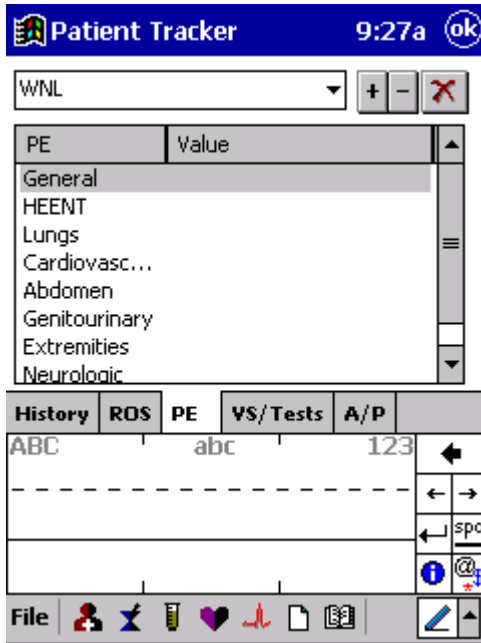
c) Enter the appropriate history. Select Use Meds if you would like to include a medication list in your note. Note that for each category of the history that there are preloaded phrases which are customizable by the user (See Edit Categories). Also note that a Medication may be added while creating the note by selecting the Add Medications Button on the note interface.



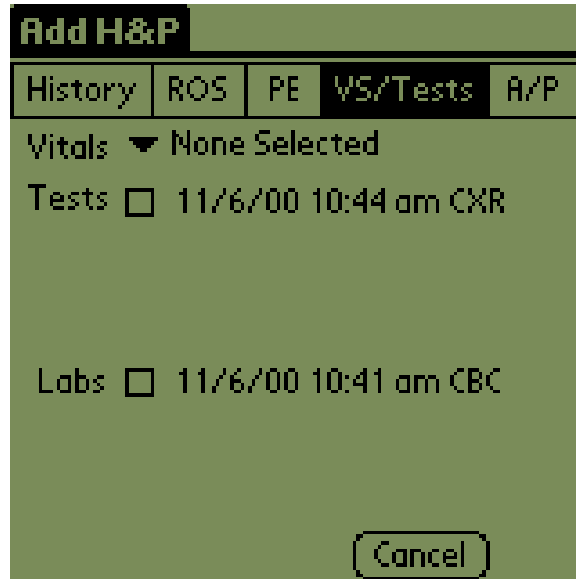
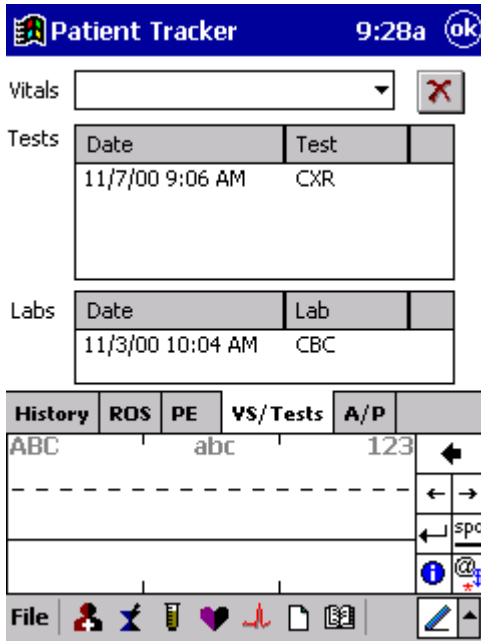
d) Enter in the appropriate information for the Review of Systems questions. Note that the ROS is customizable by the user (See edit lists section).



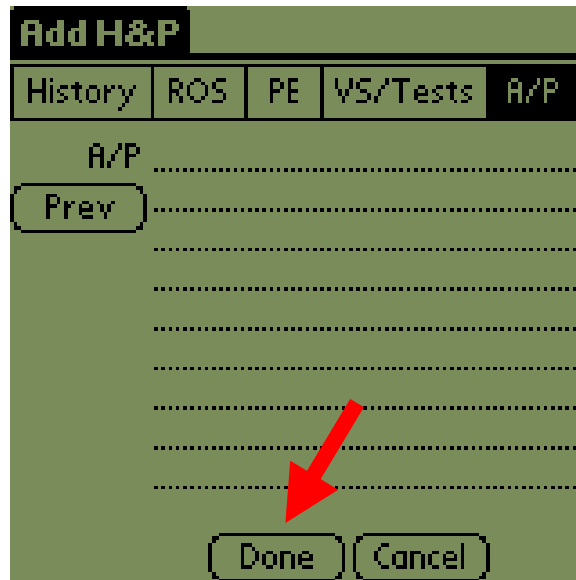
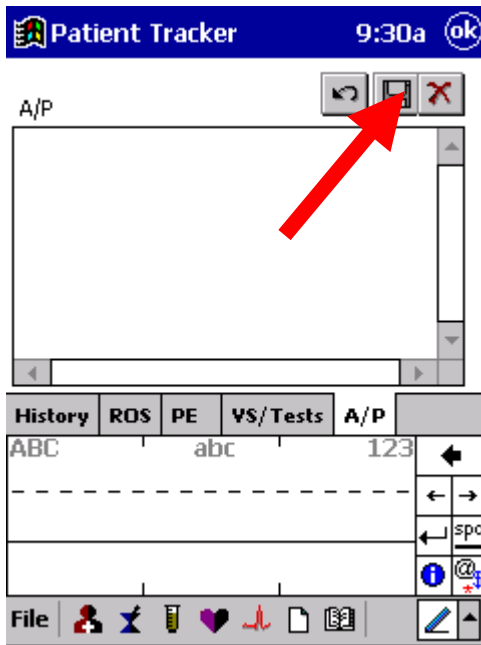
e) Enter the appropriate physical exam information for the patient. Note that for each category of the PE that there are preloaded phrases which are customizable by the user (See edit lists section).



f) Select vital signs, lab and test results to be included in the note.

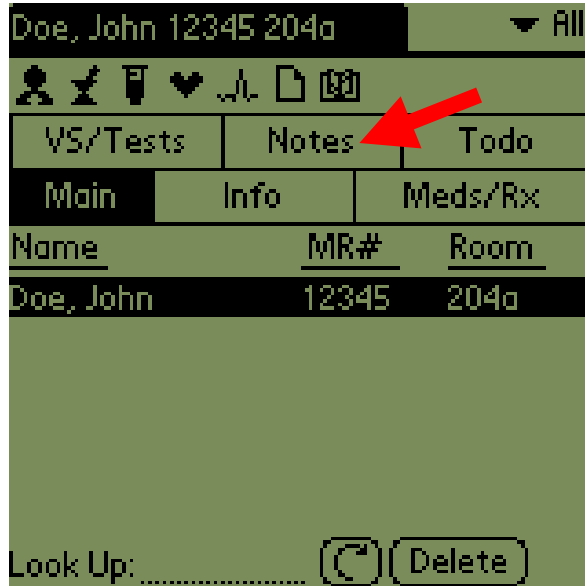
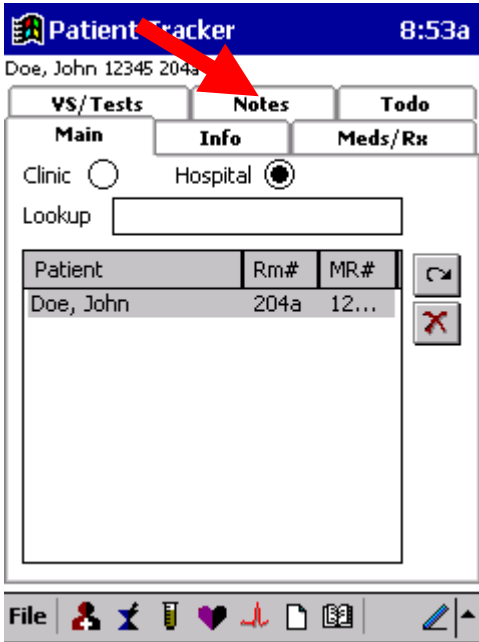


g) Enter the assessment and plan for the patient, and then press the Save Notes Button. **NOTE:** You may import portions of a previous note at any time by pressing the Import Previous Button.

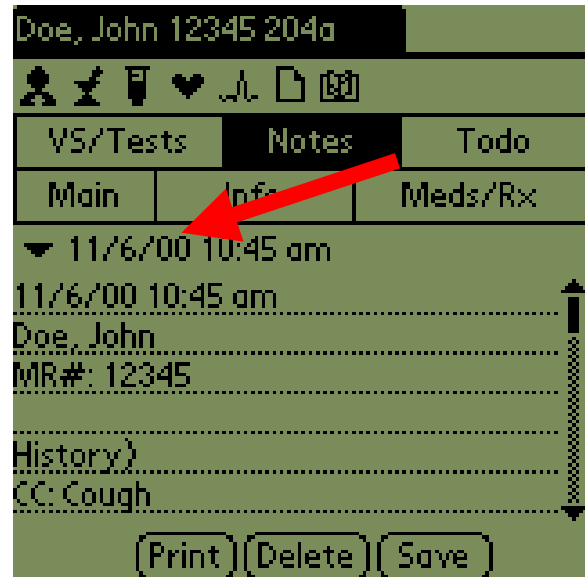
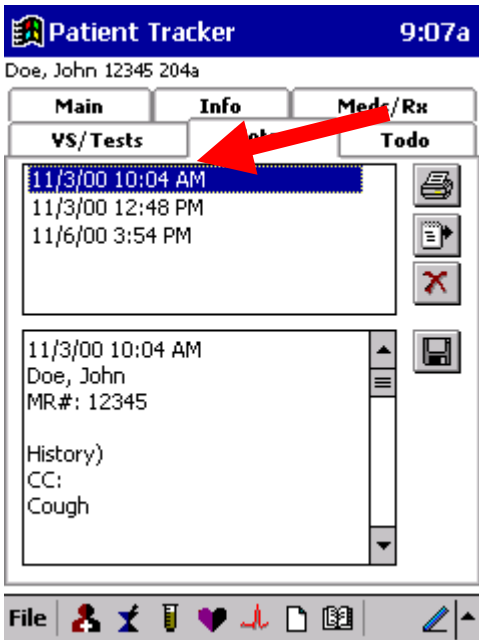


3. Viewing a Note

a) Select the Notes tab.

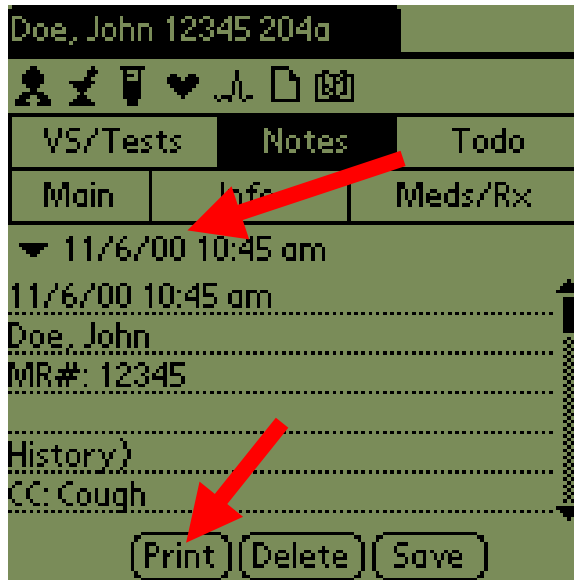
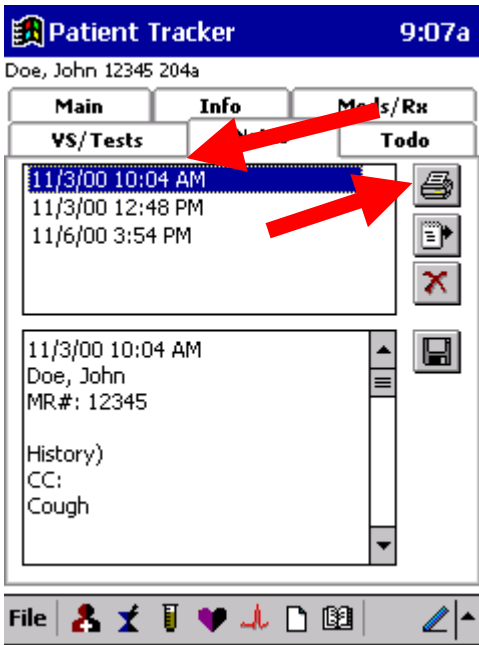


b) Select the date and time of the note that you would like to view.



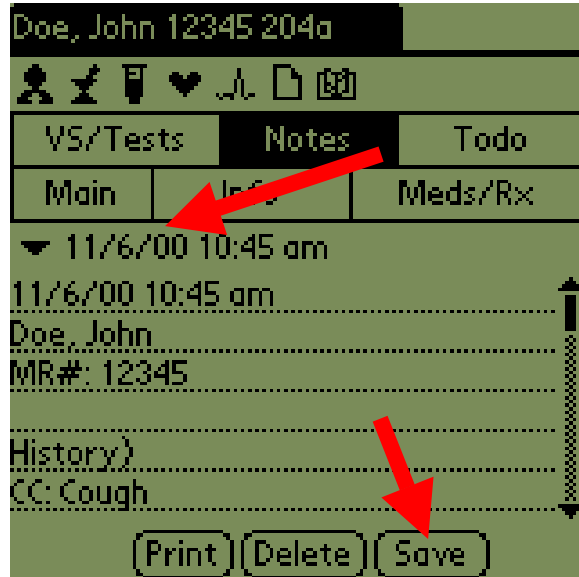
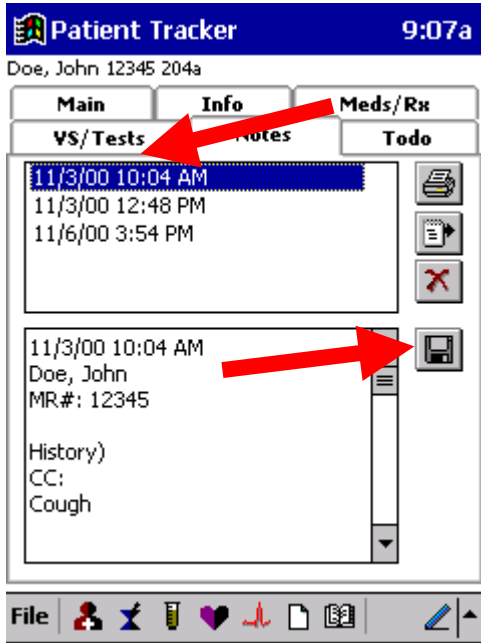
4. Printing a Note

a) Select the time and date of the Note that you would like to print, and press the Print Note Button. Point the infrared port of the handheld device towards the infrared port of a printer.



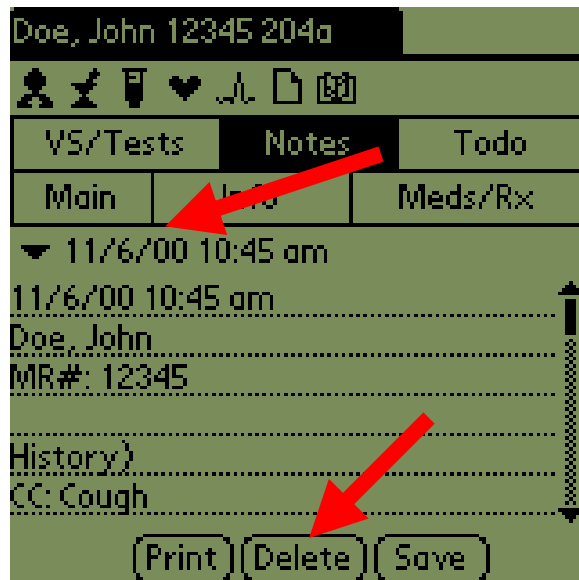
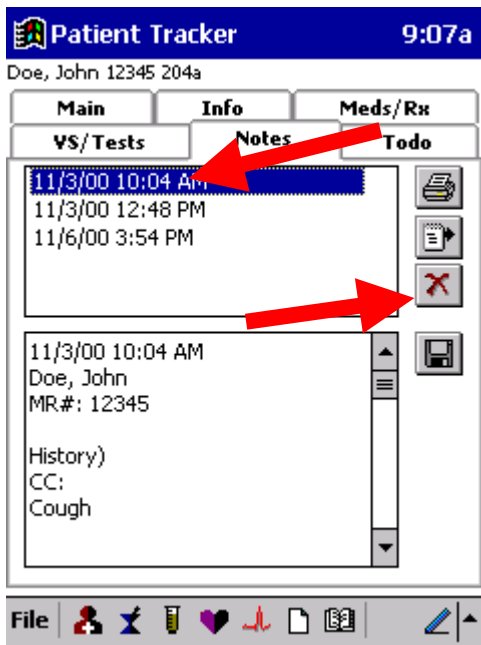
5. Editing a Note

- a) Select the time and date of the Note that you would like to edit, make the desired changes, and then press the Save Record Button.



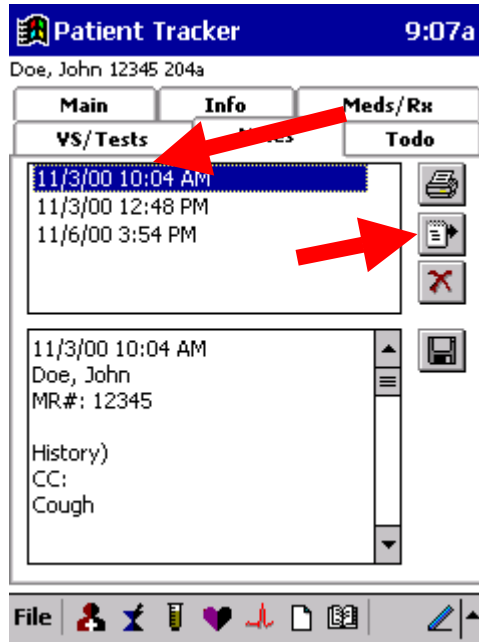
6. Deleting a Note

- a) Select the time and date of the Note that you would like to delete and then press the Delete Note Button.



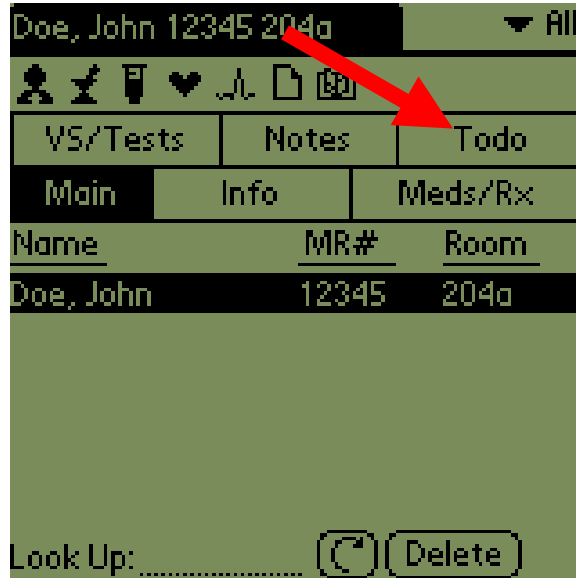
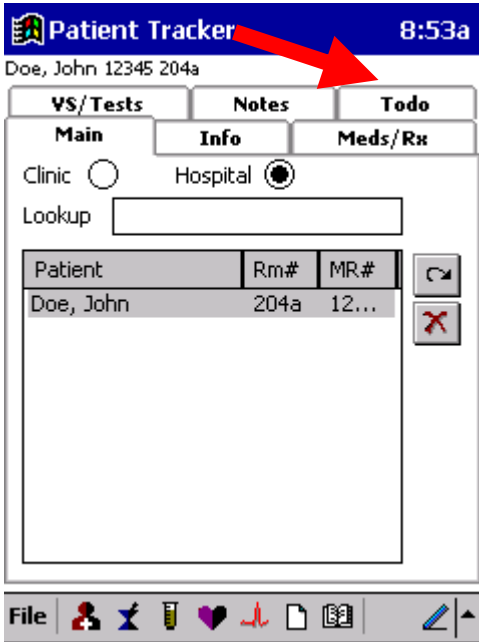
7. Exporting a Note to a text file (Windows CE only)

- a) Select the time and date of the Note that you would like to export and press the Export Note Button.

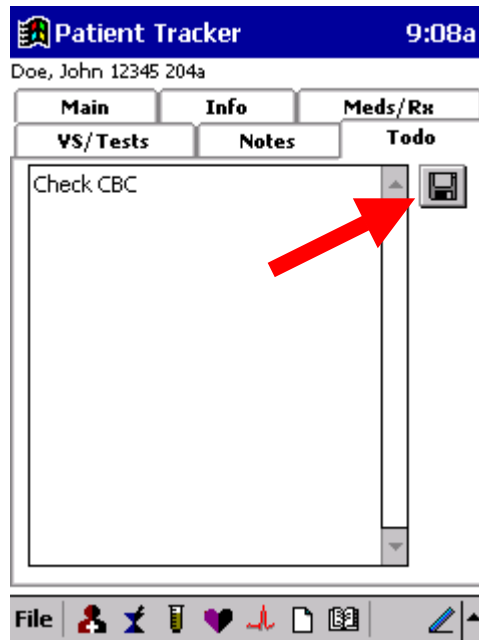


I. To Do List

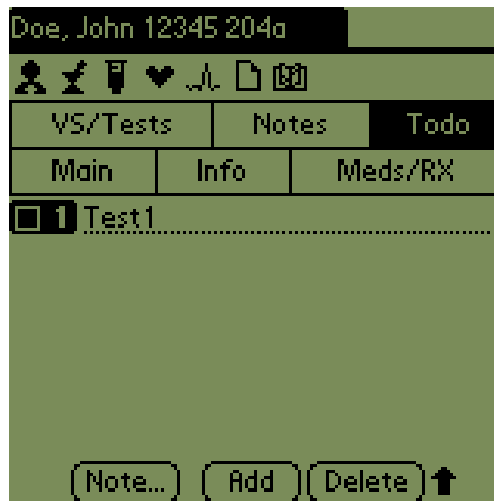
1. To create a To Do item, or edit an item for the Patient, Select the To Do tab.



2. Windows CE: Add the text for the To Do item and press the Save Record Button.

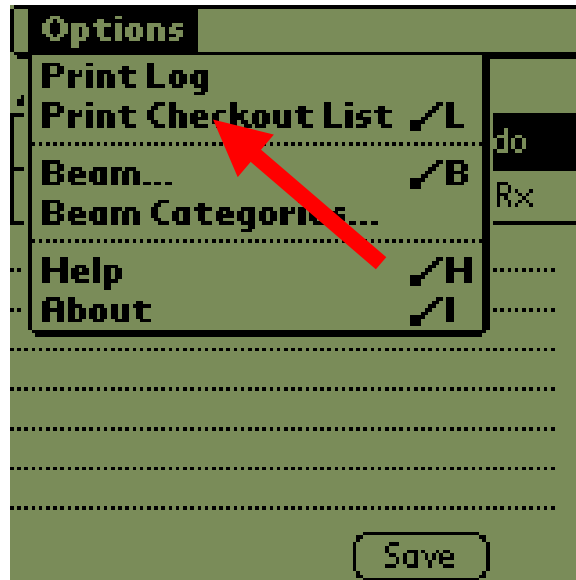
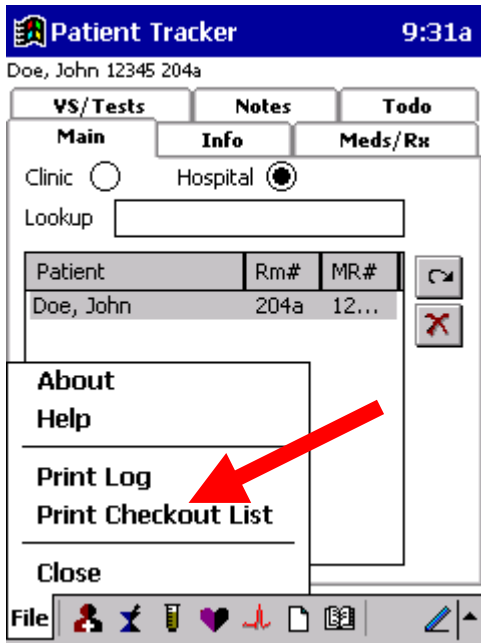


3. Palm OS: To add a new To Do item, press the “Add” button. Enter the text for the item, and select the level of priority. To delete, check the box in front of the item you wish to delete, and press the “Delete” button. To add a note with a To Do item, select the item and then press the “Note” button.

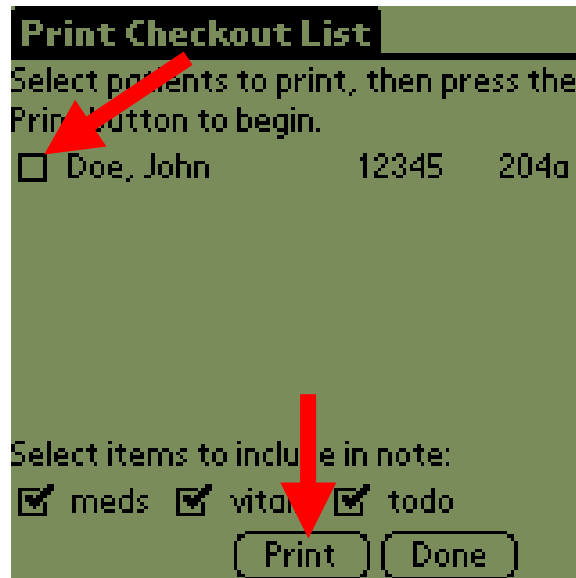
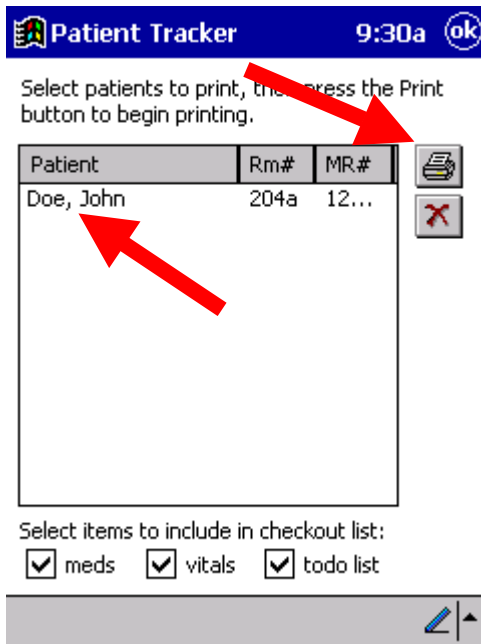


J. Checkout Lists

1. To print or beam (Palm OS only) a checkout list, select Print or Beam Checkout List from the Menu.

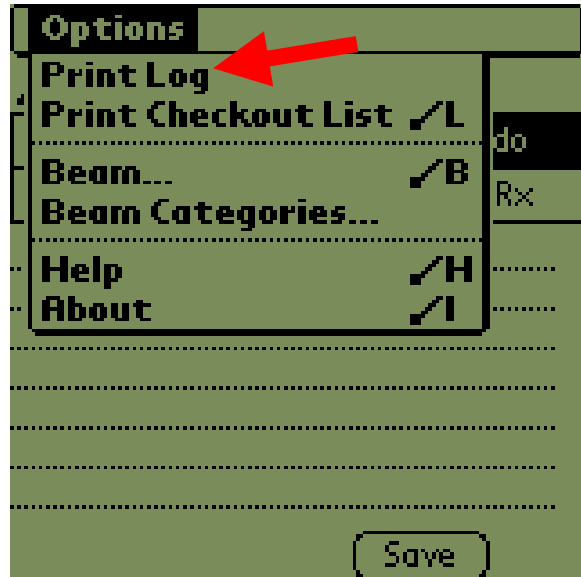
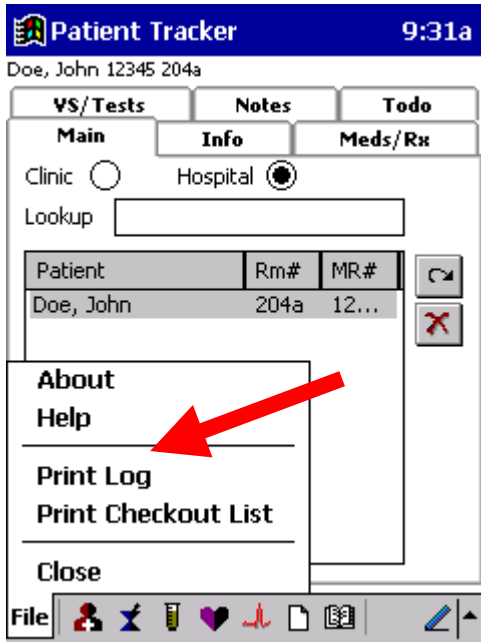


2. Select the Patients and information to include in the Checkout List, and then press the Print Checkout List Button/Beam button. Point the infrared port of the handheld device towards the infrared port of a printer, or the other person's IrDA enabled device.



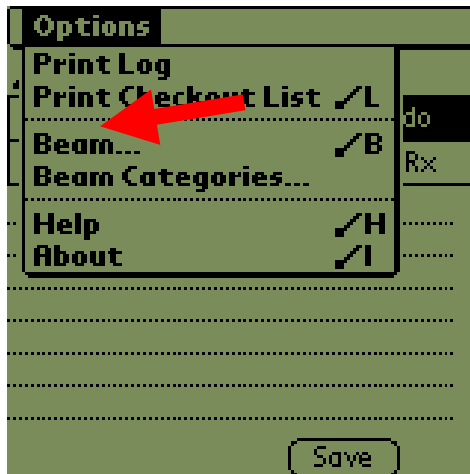
K. Printing a Patient Log

1. Select Print Patient Log from the Menu. Point the infrared port of the handheld device towards the infrared port of a printer.

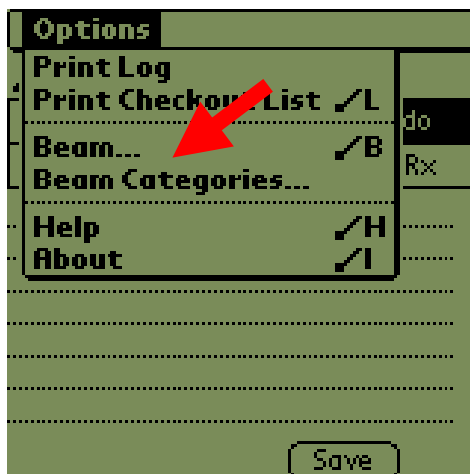


L. Beaming Information (Palm OS Only)

1. General- Beaming is entirely dependent on the selected tab. If the Main or Info tabs are selected, the Patient information is beamed. If any other tab is selected, the selected value (Medication, Lab Result, Vital Sign, etc) will be beamed. If a value is beamed and the Patient does not exist on the other person's device, the Patient information will be transferred first, followed by the result. To activate beaming, select Beam from the Menu



2. You may choose to beam your customized categories to another user. To do this, Select Beam Categories from the Menu.



- 3. You may beam a copy of Patient Tracker to others with a Palm OS device by selecting "Beam Patient Tracker" from the menu.**

M. Technical Support

- 1. If you need technical support outside of this document, please contact support@handheldmed.com.**